GET CONNECTED

ELECTRIC VEHICLE QUARTERLY REPORT

ALLIANCE FOR AUTOMOTIVE INNOVATION

FOURTH QUARTER, 2025

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Electric Vehicle Sales Overview

Editor's Note: Since 2024, federal EV policy has shifted significantly, culminating in the expiration of federal consumer EV tax credits on September 30, 2025. This edition of Get Connected looks back at the fourth quarter of 2025 – the first full quarter following the statutory end of federal purchase incentives.

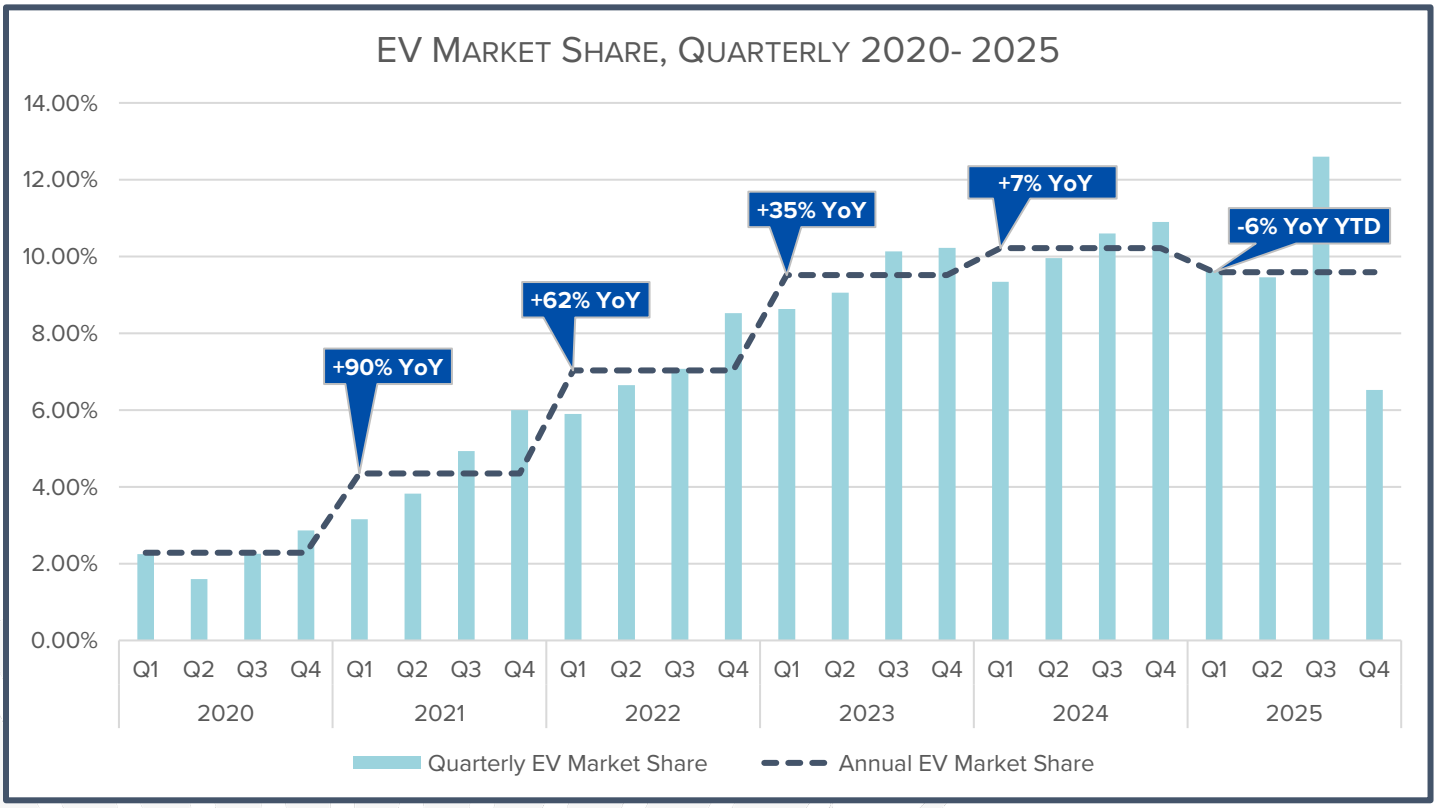
The third quarter saw a sharp increase in EV sales as consumers accelerated purchases ahead of the incentive deadline. As expected, fourth-quarter results reflect the pull-ahead effect, with sales moderating as the market adjusts to new conditions.

As the industry transitions into this new phase, 2026 is shaping up to be a period of recalibration. Demand patterns are normalizing, manufacturers are adjusting production and pricing strategies, and the market is responding to evolving policy and economic conditions.

Even amid this transition, EVs remain an important segment of the U.S. auto market – driven by consumer interest, ongoing product innovation, and the broader imperative of strengthening U.S. global competitiveness. This report continues our commitment to providing clear, data-driven insights on EV sales and charging infrastructure. We close with a spotlight on charging deployment and the infrastructure buildout supporting long-term U.S. market growth.

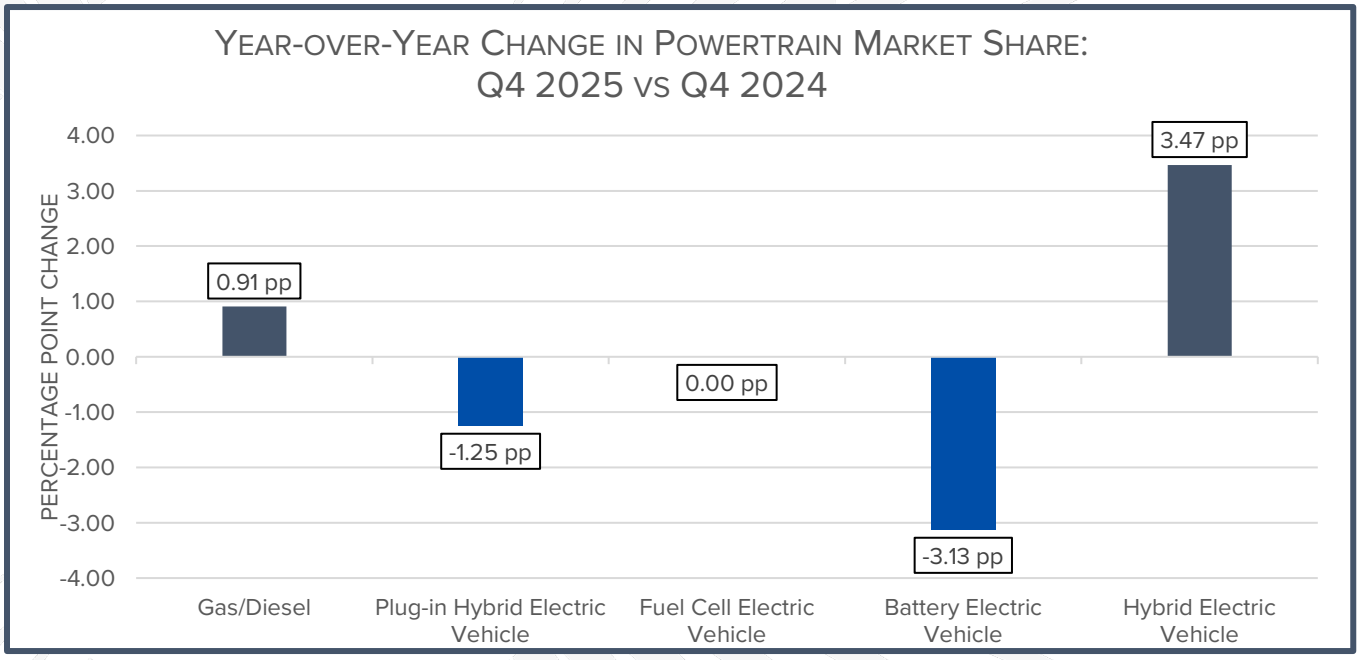
Fourth Quarter, 2025

In the fourth quarter of 2025, automakers sold 246,755 electric vehicles (EVs, including battery, plug-in hybrid, and fuel cell electric vehicles) in the United States, representing 6.5 percent of overall light-duty vehicle sales – the lowest market share since the first quarter of 2022. This represents a 6.1 percentage-point decline from the third quarter of 2025, or roughly 257,000 fewer EV sales. Sales in the fourth quarter represented 16 percent of all EV sales in 2025.



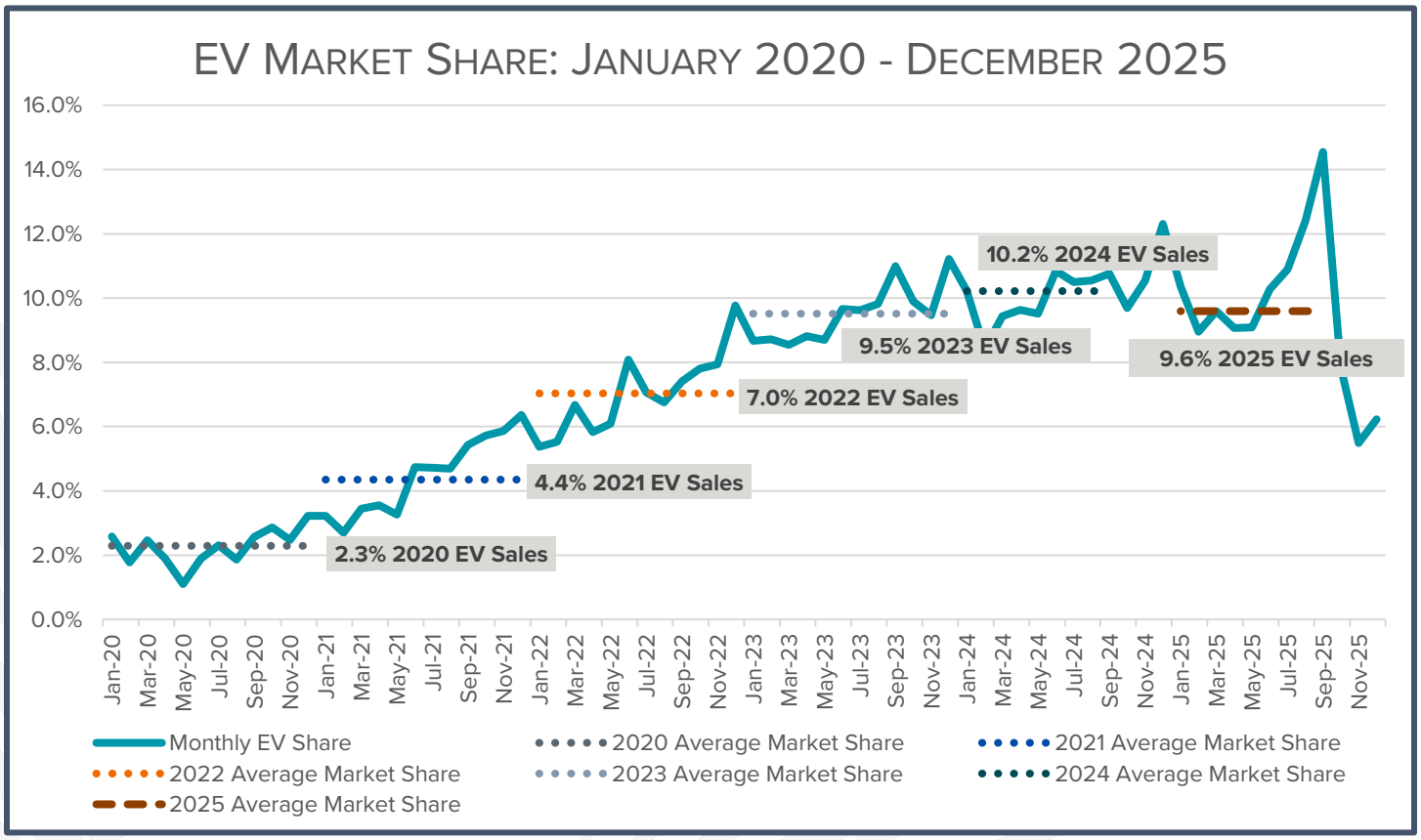
Year-Over-Year (Q4 2025 vs Q4 2024)

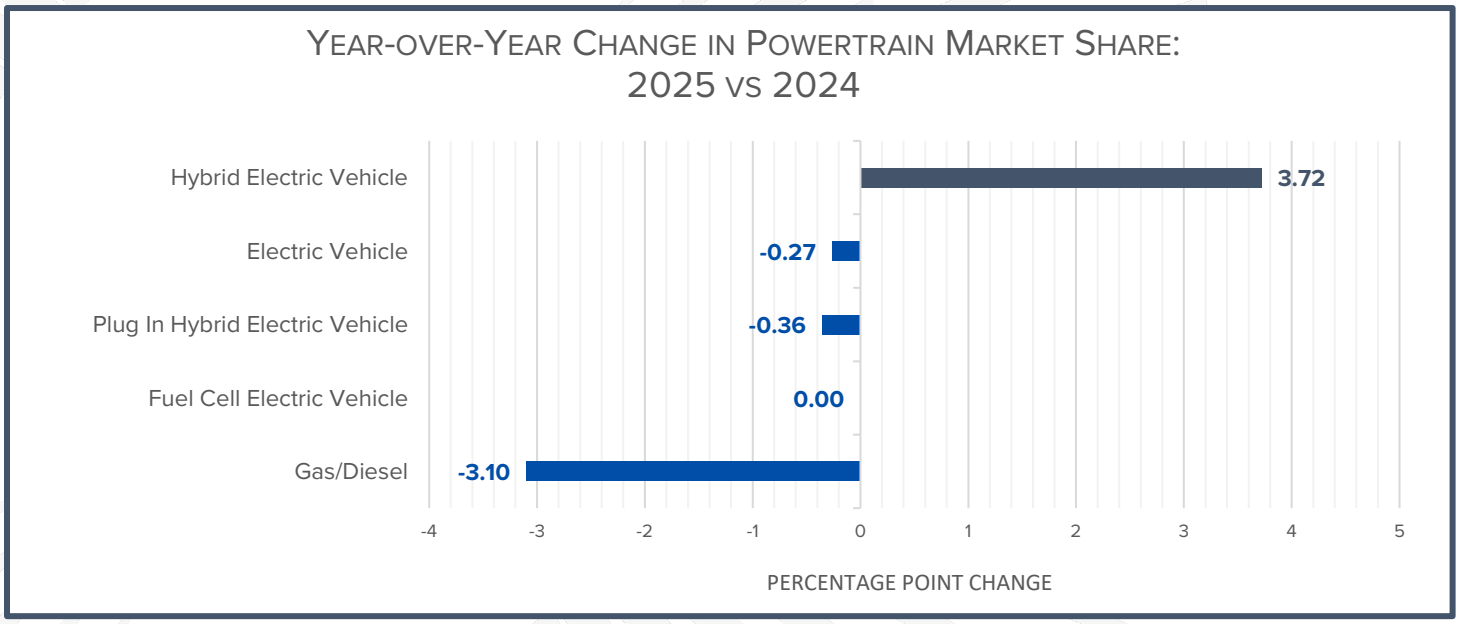
Year-over-year (YoY), EV market share declined 4.4 percentage points in Q4 2025 compared to Q4 2024. Overall light-duty vehicle sales fell 5 percent over the same period, while EV volume dropped 43 percent – a decline of roughly 187,000 vehicles. By contrast, internal combustion engine (ICE) vehicle market share increased by 0.9 percentage points, reversing the normal trend of ICE contraction. Losses in BEV and PHEV share benefited ICE vehicles, but the big winner was hybrids, up 3.5 pp. See more on the evolving market share of powertrains below.

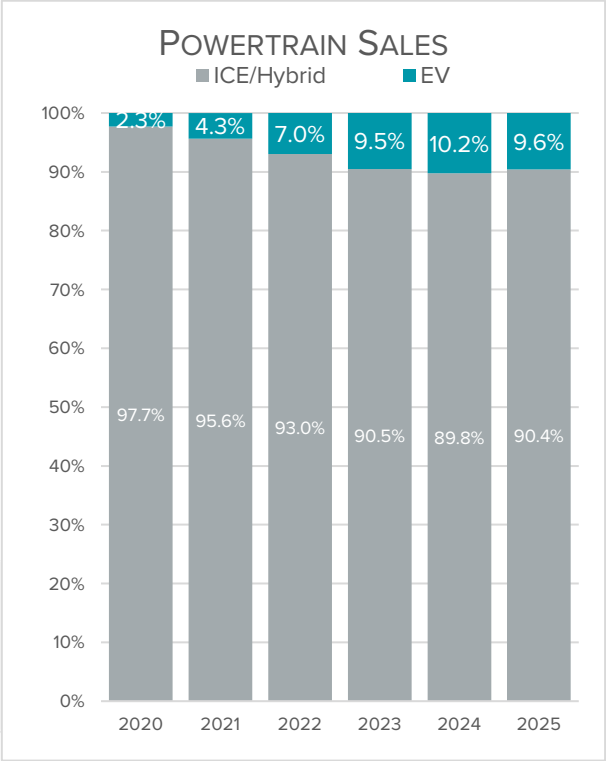


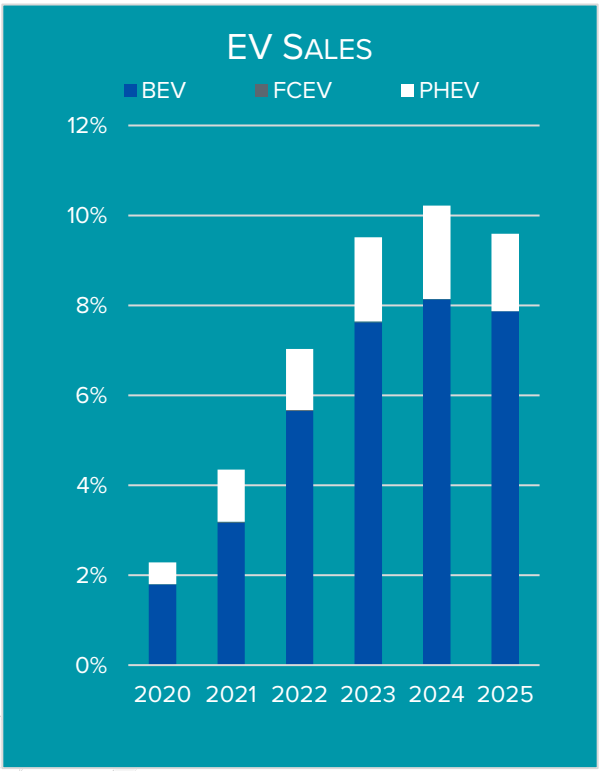
Year to Date (Full Year), 2025

Nearly 1,511,549 EVs were sold in 2025, representing 9.6 percent of all light-duty vehicle sales, a 0.62 percentage point decline from 2024. Total light-duty sales increased 2.2 percent YoY, while EV volume fell 4 percent (approximately 63,500 vehicles). By comparison, ICE vehicle market share declined 3.1 percentage points in 2025 versus 2024, with those losses fully offset by gains in traditional hybrids.





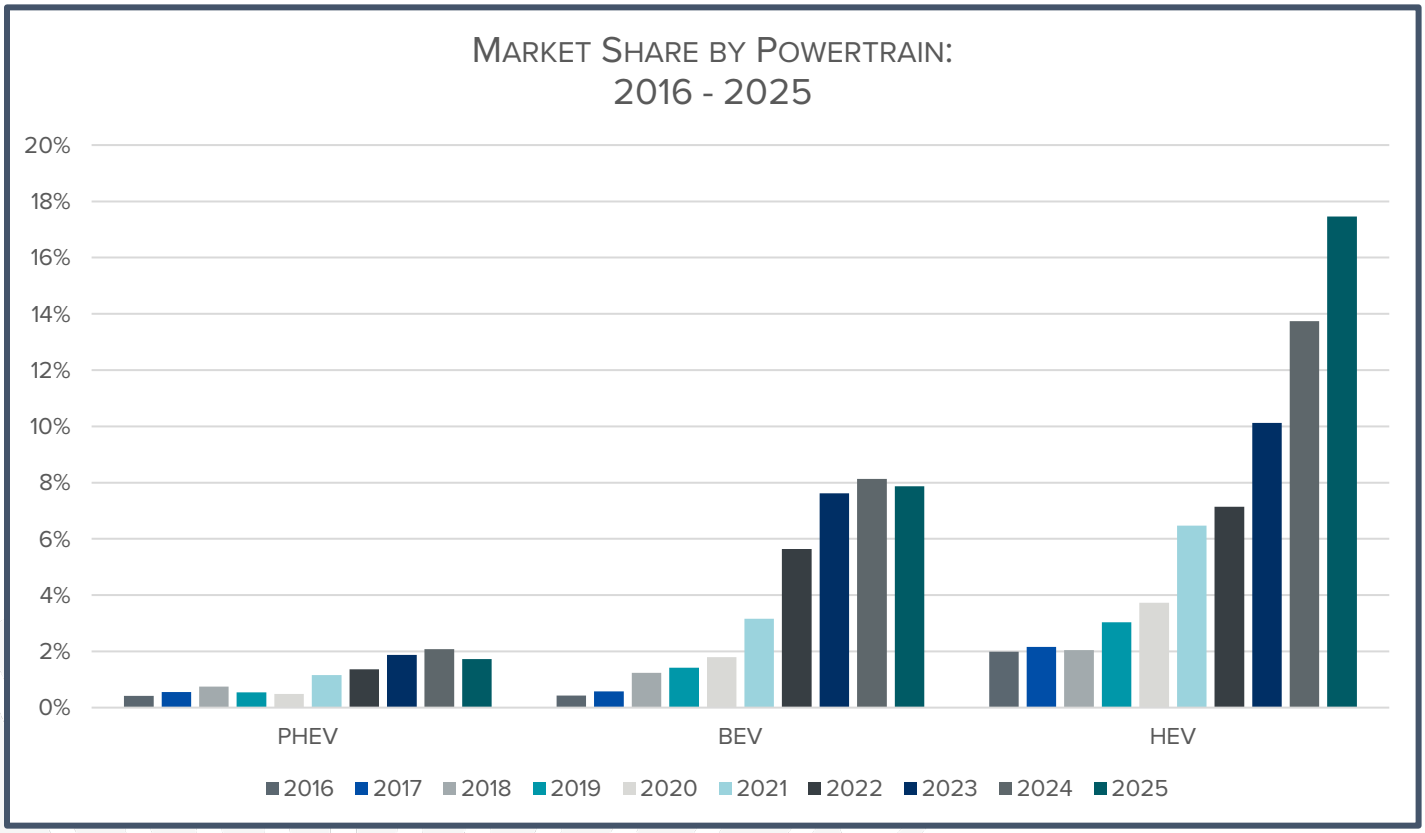




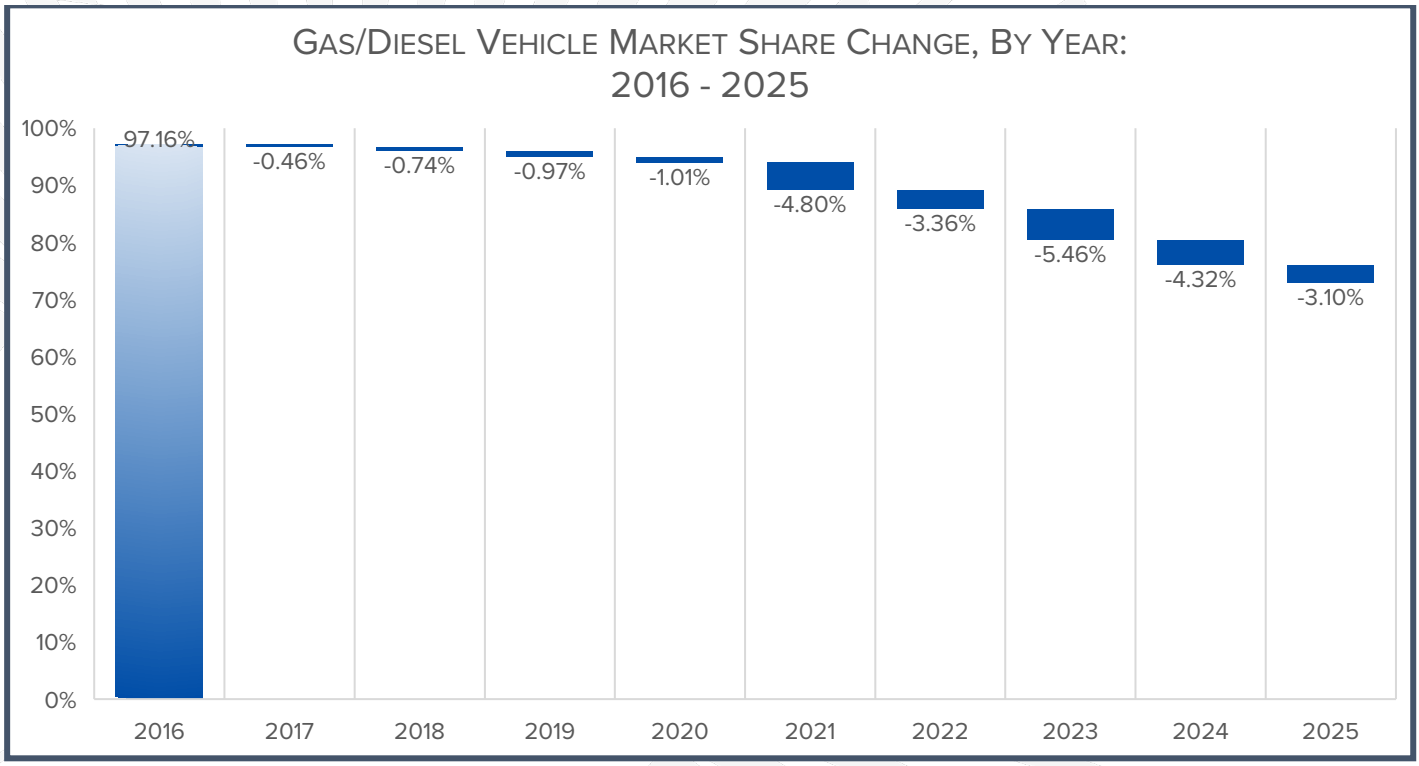
Evolving Market Share of Powertrains: 2016 - 2025

Despite a modest uptick in ICE market share in Q4, the longer-term trend remains clear. From 2016 through 2025, traditional ICE share steadily declined. In 2016, ICE vehicles accounted for more than 97 percent of all light-duty sales; by 2025, year-to-date share had fallen to 72.9 percent, a cumulative decline of 24.2 pp (including a 3.1 pp drop from 2024 alone).

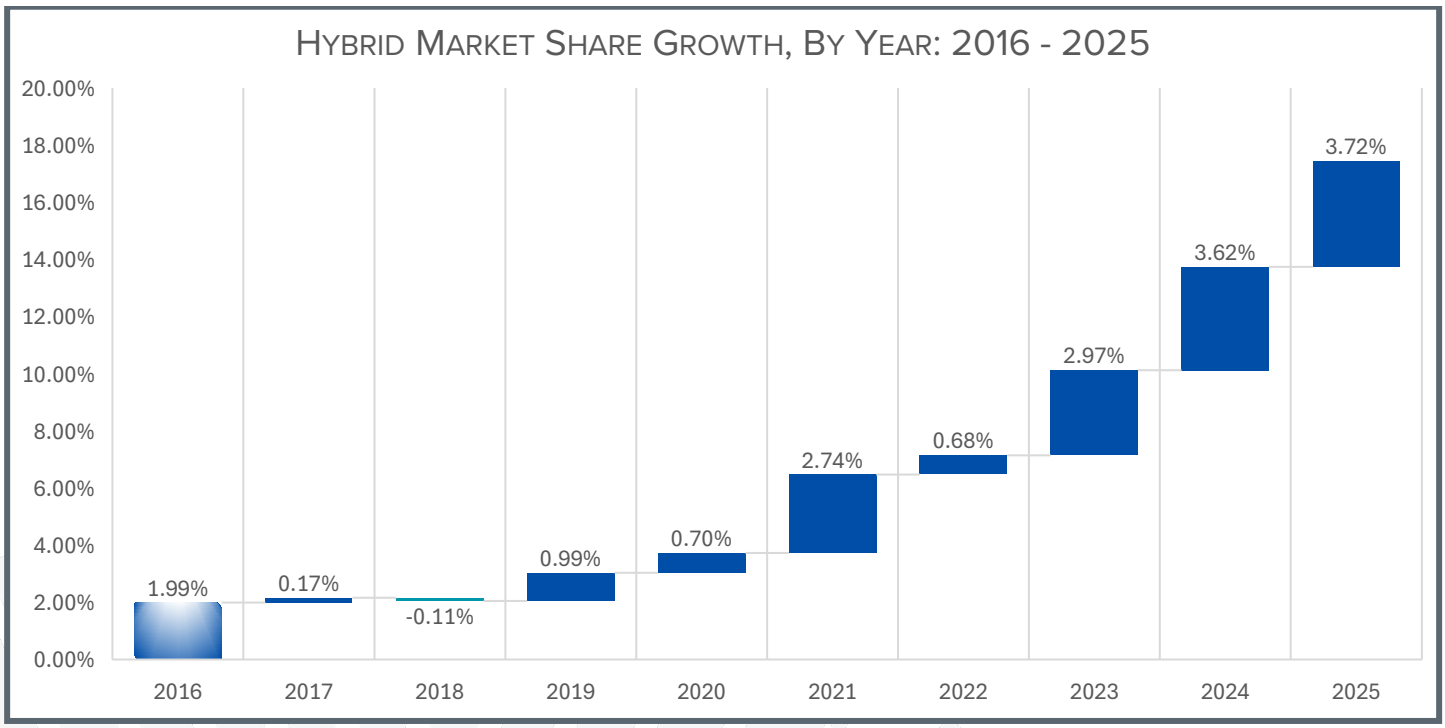
That shift has been absorbed by alternative powertrains. Traditional (mild and strong) hybrids captured the majority of the gains (+15.5 pp), followed by BEVs (+7.4 pp) and PHEVs (+1.3 pp) over the past nine years.



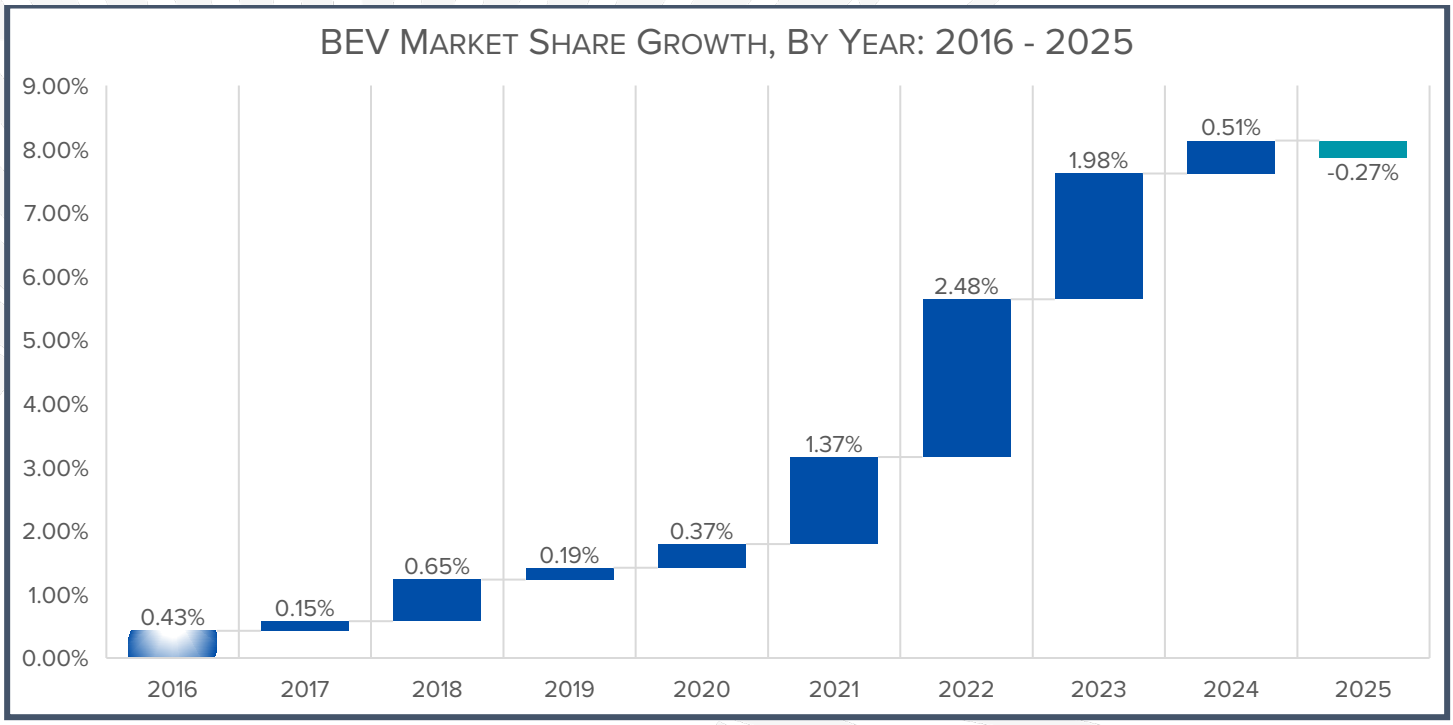
ICE market share decreased from 97 percent in 2016 to 72.9 percent through 2025 (-24.2 pp):



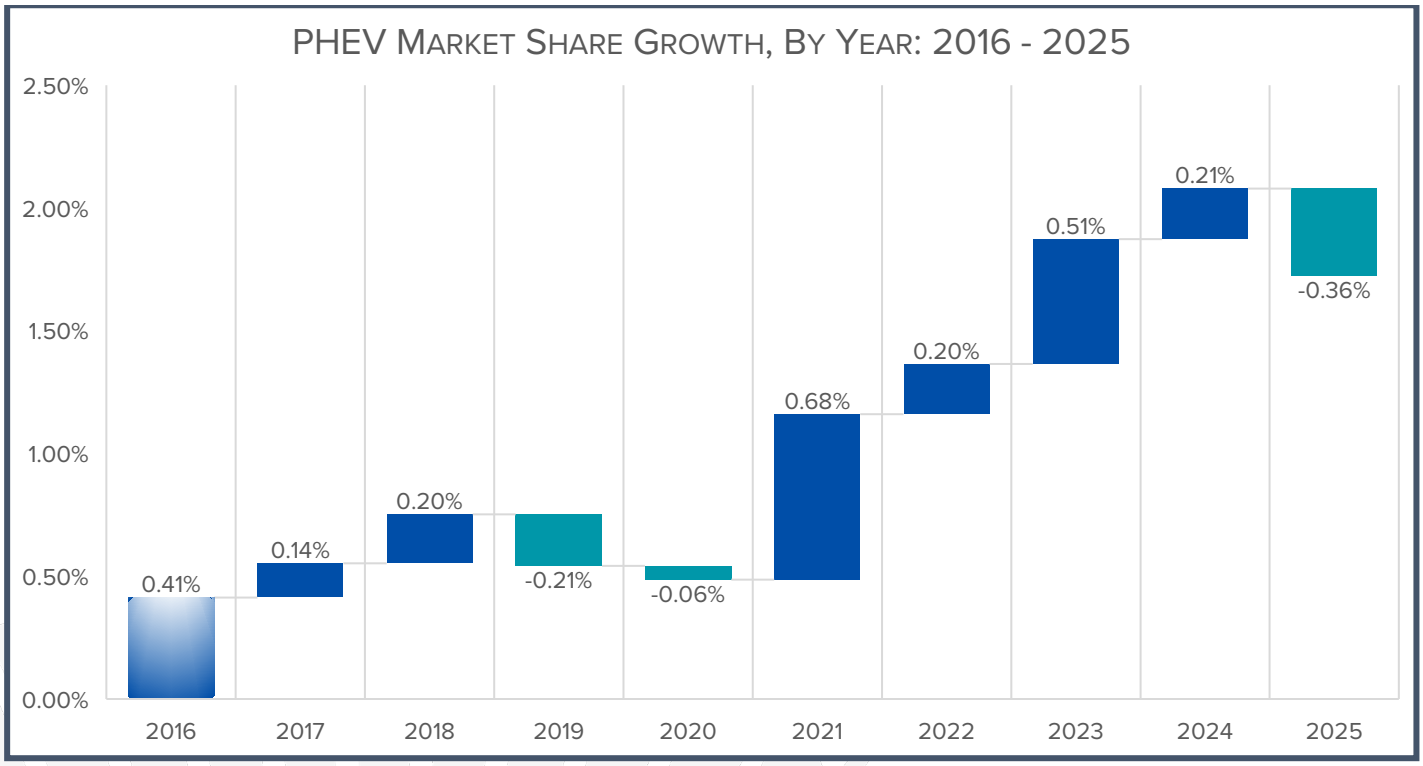
Hybrid market share grew from 2 percent in 2016 to 17.5 percent through 2025 Q3 (+15.5 pp):



BEV market share grew from .43 percent in 2016 to 7.9 percent through 2025 (+7.4 pp):



PHEV market share grew from .41 percent in 2016 to 1.7 percent through 2025 (+1.3 pp):



SEE ADDITIONAL HISTORIC DATA ON EV SALES HERE

Electric Vehicle Sales by Segment

While passenger cars once dominated the EV market, manufacturers continue to introduce new models to satisfy a variety of consumer needs. Utility vehicle (UV) offerings continue to grow, and while electric pickup trucks are a relatively new entry to the market (making their commercial debut in September 2021), there are 7 models available now. As a result, non-car segments are continuing to make gains, and in the fourth quarter of 2025, light truck (UVs, minivans, and pickups) sales comprised 82 percent of the EV market – a 3 pp decrease from the all-time high of 85 percent in Q3 2025.

Quarterly sales of BEV and PHEV UVs have grown from about 19 percent of EVs at the start of 2020 to 73 percent in the fourth quarter of 2025 (about 180,000 vehicles). Year-over-year, UV sales have increased 1 pp (though about 133,000 vehicles fewer).

EV Model Availability

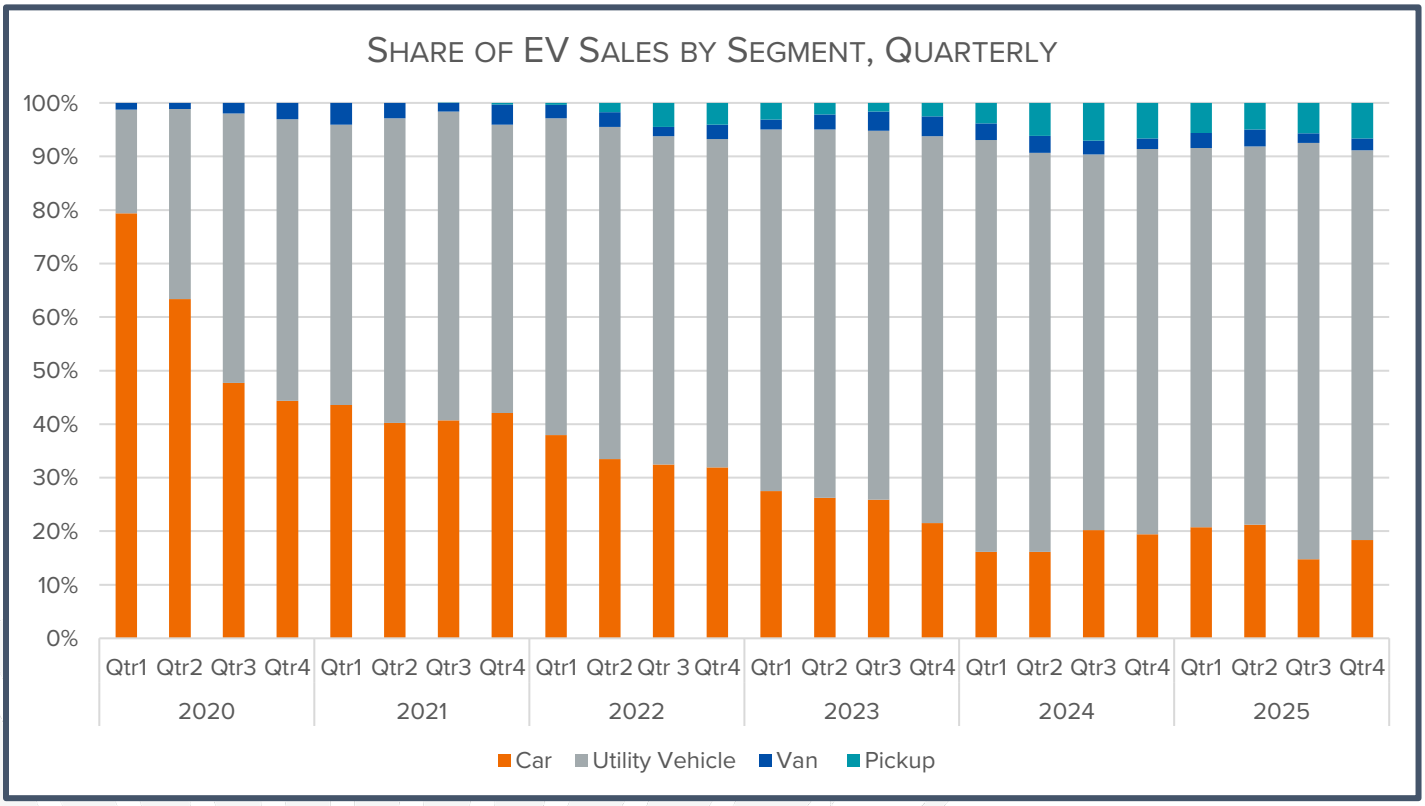
164 Vehicle Models Sold in Q4 2025:

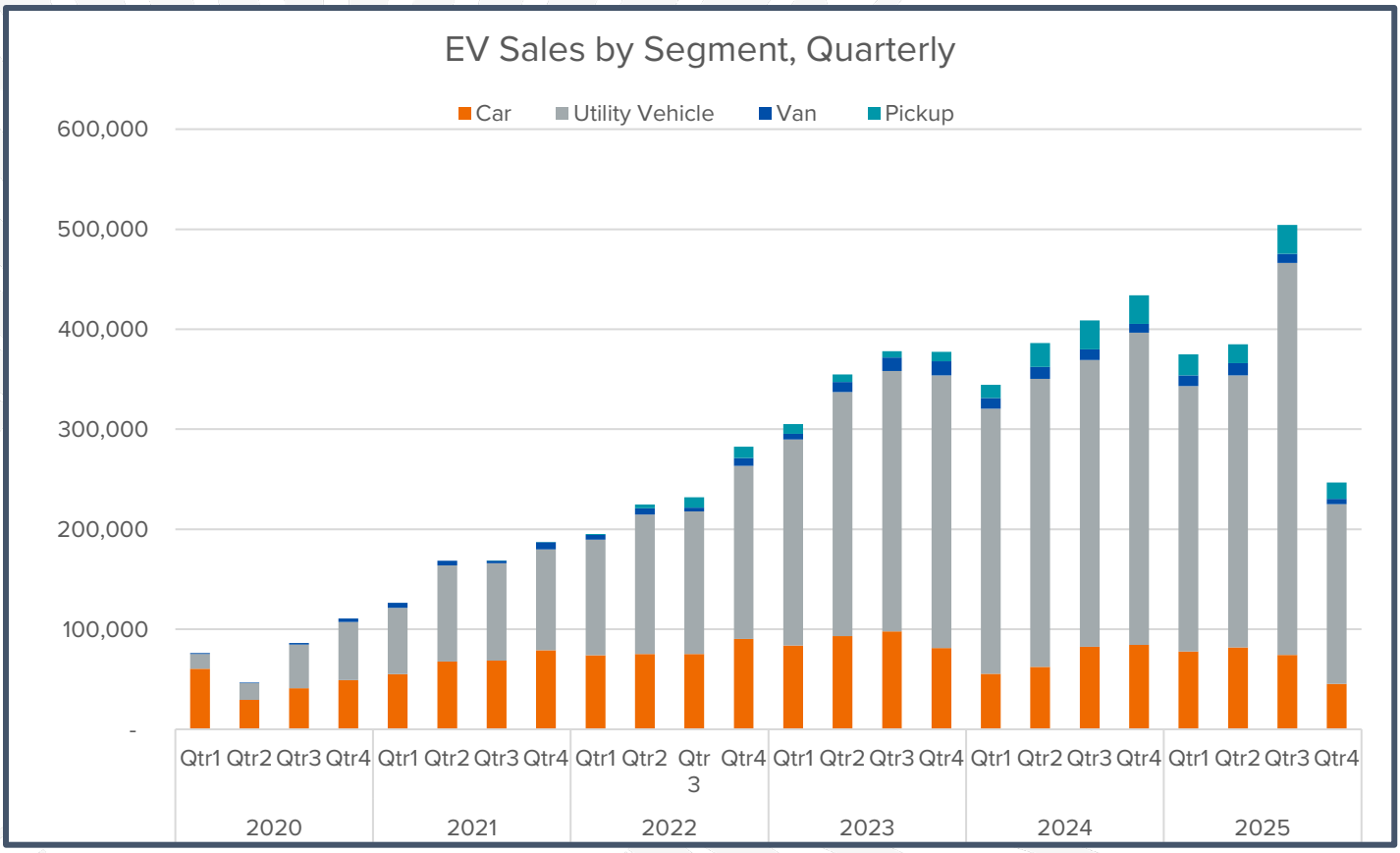
102 Battery Electric Vehicles
- 26 Cars
- 58 Utility Vehicles
- 7 Pickups
- 11 Vans*

59 Plug-in Hybrid Vehicles
- 25 Cars
- 33 Utility Vehicles
- 1 Van

3 Fuel Cell Electric Vehicles**
- 1 Car
- 2 Utility Vehicle

**Includes some commercial vehicles*
***Includes Plug-in Hybrid Fuel Cell*

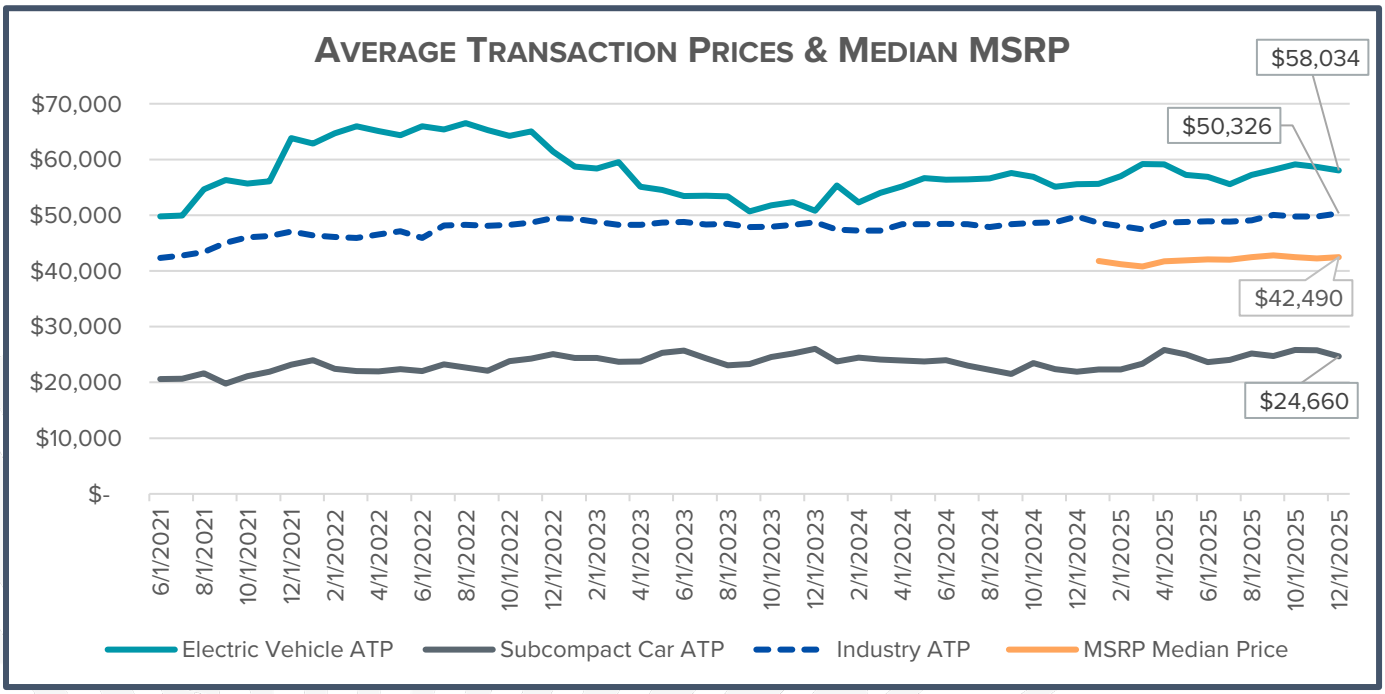




Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2020 – December 31, 2025

Electric Vehicle Transaction Prices

New EV Average Transaction Prices: "The average transaction price (ATP) for new EVs in December was $58,034, up 2.4% year over year but down 0.4% month over month. [Manufacturer] incentives climbed sharply to a year-high of $10,473, or 18% of ATP, up 5 percentage points from November and reaching record territory. The price premium over ICE+ [includes ICE and Hybrid] vehicles narrowed to $8,347, driven by elevated discounting."[1]



Average transaction price Compiled from Kelley Blue Book Press Releases, June 2021 – December 2025; Median MSRP from S&P Global Mobility New Vehicle Registrations January – December 2025.

Used EV Listing Price: "The average listing price for used EVs was $36,408 in December, down 1.2% year over year and flat month over month, narrowing the price premium over ICE+ [includes ICE and Hybrid] vehicles to $2,591. Affordability remained steady, with 39% of models selling below $25,000."[2]

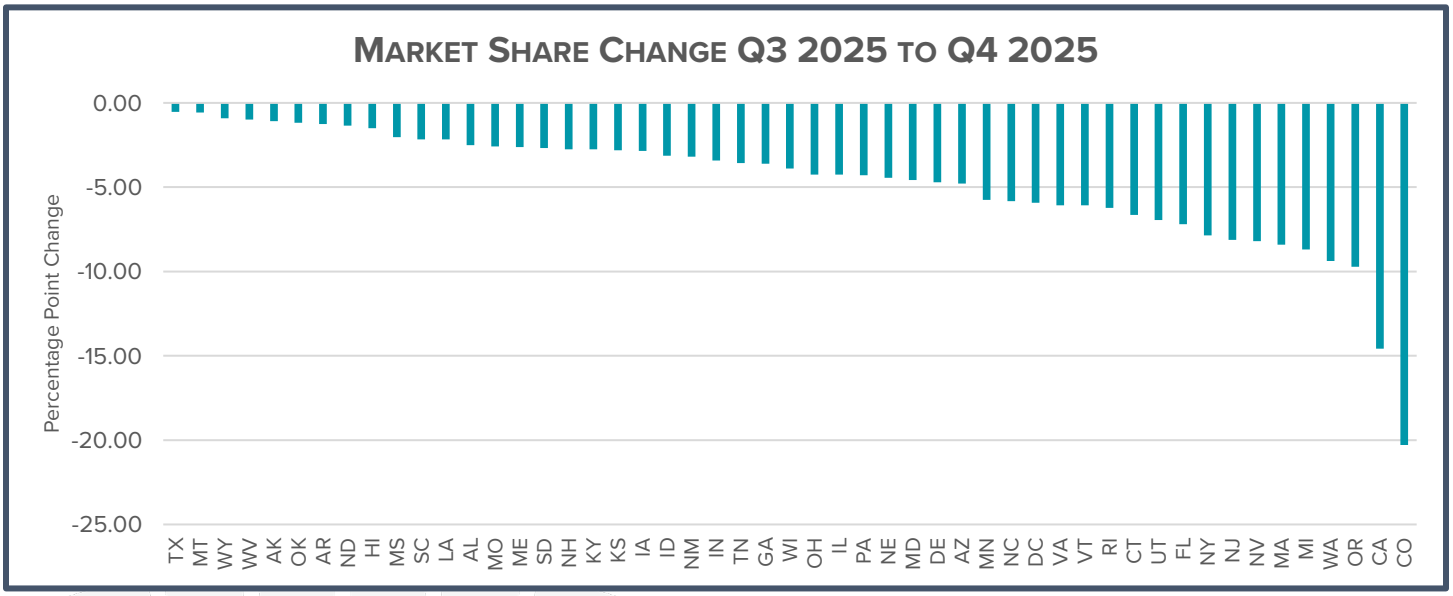
Electric Vehicle Sales by State

For the Fourth Quarter of 2025

While down substantially (-14.6 pp) from the third quarter, California again leads the nation in EV sales with BEVs, PHEVs and FCEVs accounting for 16.9 percent of sales. Notably, California dipped below 20 percent for the first time since the fourth quarter of 2021. The District of Columbia was second with 16.3 percent – the only other state above 15 percent market share. The only other states above 10 percent in the fourth quarter were Washington, Nevada, Oregon, and Hawaii.

Every state and DC decreased EV market share from the third quarter to the fourth quarter of 2025. Colorado saw the largest decrease in EV market share, losing 20.3 pp from the prior quarter. Sixteen additional states and the district of Columbia decreased by 5 pp or more. Texas decreased the least, falling only 0.5 pp from Q3.

[1] Cox Automotive, "EV Market Monitor – December 2025," 1/15/2026
[2] Cox Automotive, "EV Market Monitor – December 2025," 1/15/2026



Looking at year-over-year, for the fourth quarter of 2025 vs. 2024, the market share of new EVs registered decreased in 49 states (including D.C.). The two states with increases were Texas (0.5 pp) and Louisiana (0.2 pp). Twelve states witnessed a decrease in EV market share of 5 pp or more. The largest decrease was Colorado (17.3 pp).

For Full-Year 2025

For the full year, EV sales represented 9.6 percent of the market – a 0.6 pp decrease over 2024. Nearly 24 percent of sales in California were EVs. Michigan experienced the greatest increase in market share, year-over-year with a 2.4 pp increase. Following Michigan, the states with the largest market share gains were Louisiana (1.4 pp), Nevada (1.2 pp), and Georgia (1 pp). In total, 17 states increased their year-over-year EV market share, however 13 of those states increased by 1 pp or less. Thirty-three states and D.C. decreased. Vermont saw the largest decline in market share, down 3.0 pp.

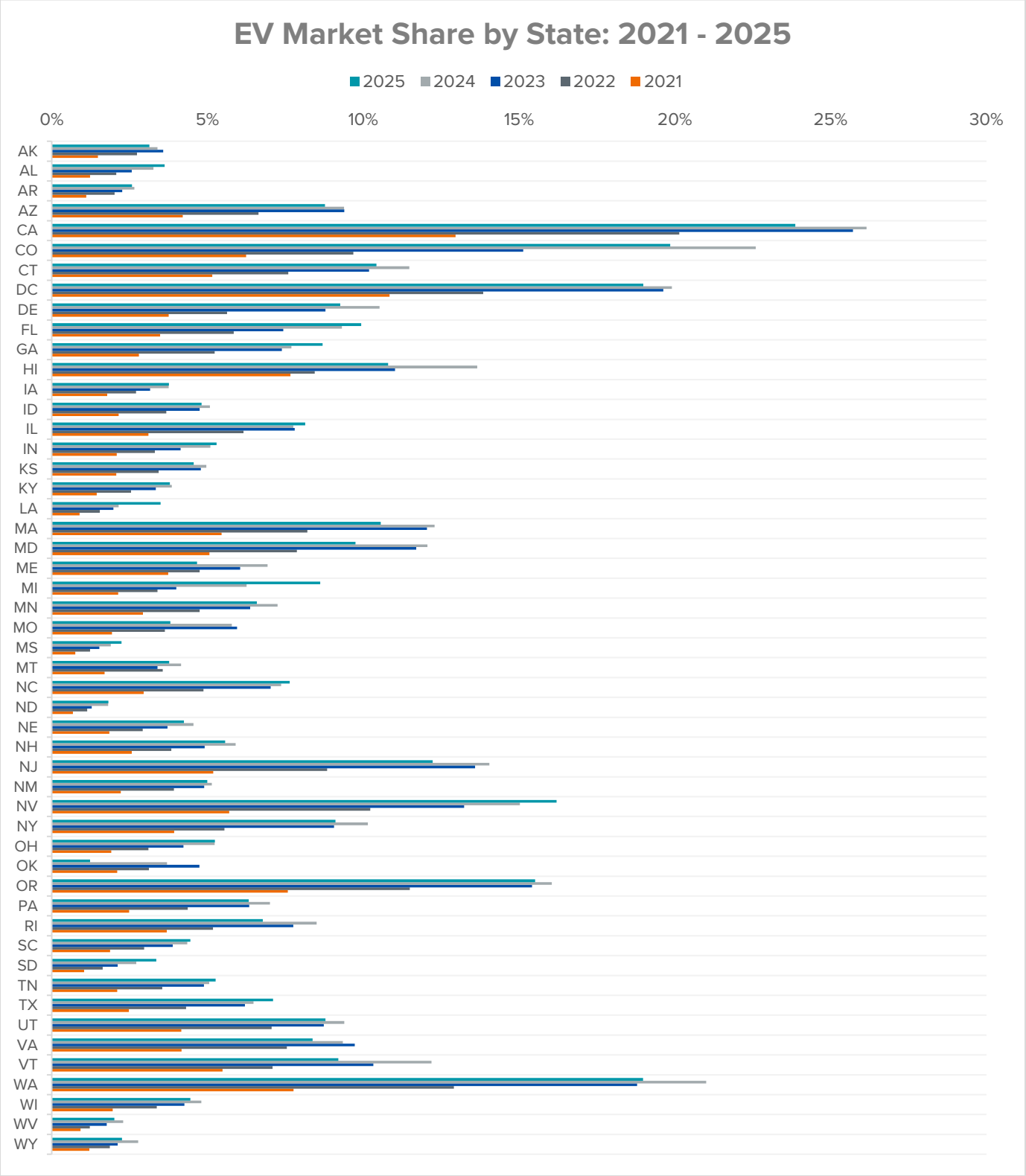
While some states continue to have strong EV sales, six states had new EV registrations of less than 3 percent; Oklahoma and North Dakota were under 2 percent. All states had a market share above 1 percent for new EV sales.

For the full year, 9 states and the District of Columbia had an EV market share above 10 percent while 2 states had an EV market share under 2 percent; California was the only state above 20 percent. [3]

2025 EV Market Share by State (Full Year)

1	CA	23.9%	**11**	FL	9.9%	**21**	IL	8.1%	**31**	NM	5.0%	**41**	IA	3.8%
2	CO	19.9%	**12**	MD	9.8%	**22**	NC	7.6%	**32**	ID	4.8%	**42**	AL	3.6%
3	DC	19.0%	**13**	DE	9.3%	**23**	TX	7.1%	**33**	ME	4.7%	**43**	LA	3.5%
4	WA	19.0%	**14**	VT	9.2%	**24**	RI	6.8%	**34**	KS	4.6%	**44**	SD	3.4%
5	NV	16.2%	**15**	NY	9.1%	**25**	MN	6.6%	**35**	SC	4.5%	**45**	AK	3.1%
6	OR	15.5%	**16**	UT	8.8%	**26**	PA	6.3%	**36**	WI	4.5%	**46**	AR	2.6%
7	NJ	12.2%	**17**	AZ	8.8%	**27**	NH	5.6%	**37**	NE	4.2%	**47**	WY	2.3%
8	HI	10.8%	**18**	GA	8.7%	**28**	IN	5.3%	**38**	MO	3.8%	**48**	MS	2.2%
9	MA	10.6%	**19**	MI	8.6%	**29**	TN	5.3%	**39**	KY	3.8%	**49**	WV	2.0%
10	CT	10.4%	**20**	VA	8.4%	**30**	OH	5.2%	**40**	MT	3.8%	**50**	ND	1.8%
												51	OK	1.2%

[3] Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1, 2021 – December 31, 2025


EV Market Share by State: 2021 - 2025
2025
2024
2023
2022
2021
0%
5%
10%
15%
20%
25%
30%
AK
AL
AR
AZ
CA
CO
CT
DC
DE
FL
GA
HI
IA
ID
IL
IN
KS
KY
LA
MA
MD
ME
MI
MN
MO
MS
MT
NC
ND
NE
NH
NJ
NM
NV
NY
OH
OK
OR
PA
RI
SC
SD
TN
TX
UT
VA
VT
WA
WI
WV
WY

Fourth Quarter 2025, New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (2025 Q4 vs 2024 Q4), New Light-Duty Vehicle Registrations Powertrain			
State	Advanced Powertrain Market Share				Advanced Powertrain Market Share (Percentage Point Change)			
	PHEV	BEV	FCEV	EV Total	PHEV	BEV	FCEV	EV Total
AK	0.39%	2.17%	0.00%	**2.56%**	-0.5%	-0.7%	0.0%	**-1.21%**
AL	0.35%	1.90%	0.00%	**2.25%**	-0.4%	-1.2%	0.0%	**-1.55%**
AR	0.36%	1.52%	0.00%	**1.88%**	-0.3%	-0.9%	0.0%	**-1.23%**
AZ	1.04%	5.23%	0.00%	**6.27%**	-0.5%	-2.8%	0.0%	**-3.31%**
CA	1.86%	15.01%	0.02%	**16.90%**	-2.0%	-7.3%	0.0%	**-9.29%**
CO	1.70%	7.38%	0.00%	**9.07%**	-4.0%	-13.3%	0.0%	**-17.32%**
CT	1.40%	5.40%	0.00%	**6.80%**	-2.9%	-2.7%	0.0%	**-5.62%**
DC	3.05%	13.26%	0.00%	**16.31%**	-2.0%	-2.0%	0.0%	**-4.01%**
DE	1.48%	5.04%	0.00%	**6.52%**	-1.0%	-4.1%	0.0%	**-5.02%**
FL	0.74%	5.44%	0.00%	**6.18%**	-0.9%	-3.3%	0.0%	**-4.17%**
GA	0.65%	6.16%	0.00%	**6.81%**	-0.6%	-0.7%	0.0%	**-1.26%**
HI	1.16%	8.97%	0.00%	**10.13%**	-0.3%	0.2%	0.0%	**-0.18%**
IA	0.53%	1.73%	0.00%	**2.27%**	-0.6%	-1.3%	0.0%	**-1.95%**
ID	0.77%	2.59%	0.00%	**3.35%**	-0.8%	-2.1%	0.0%	**-2.91%**
IL	1.00%	4.84%	0.00%	**5.85%**	-0.9%	-1.9%	0.0%	**-2.81%**
IN	0.63%	2.93%	0.00%	**3.56%**	-0.8%	-1.8%	0.0%	**-2.60%**
KS	0.65%	2.27%	0.00%	**2.92%**	-0.6%	-1.9%	0.0%	**-2.50%**
KY	0.48%	2.00%	0.00%	**2.48%**	-0.6%	-1.4%	0.0%	**-1.91%**
LA	0.22%	2.65%	0.00%	**2.87%**	-0.3%	0.4%	0.0%	**0.15%**
MA	1.24%	4.93%	0.00%	**6.17%**	-2.6%	-5.4%	0.0%	**-7.98%**
MD	1.16%	6.29%	0.00%	**7.45%**	-1.5%	-3.3%	0.0%	**-4.83%**
ME	0.87%	1.98%	0.00%	**2.85%**	-2.1%	-2.6%	0.0%	**-4.63%**
MI	0.56%	3.26%	0.00%	**3.81%**	-0.9%	-4.2%	0.0%	**-5.14%**
MN	0.90%	2.70%	0.00%	**3.60%**	-1.4%	-3.3%	0.0%	**-4.74%**
MO	0.43%	1.98%	0.00%	**2.41%**	-1.1%	-2.0%	0.0%	**-3.03%**
MS	0.20%	1.16%	0.00%	**1.35%**	-0.2%	-0.6%	0.0%	**-0.83%**
MT	1.43%	2.30%	0.01%	**3.74%**	-0.5%	-0.2%	0.0%	**-0.70%**
NC	0.75%	3.71%	0.00%	**4.46%**	-0.9%	-3.2%	0.0%	**-4.04%**
ND	0.18%	1.03%	0.00%	**1.21%**	-0.3%	-0.6%	0.0%	**-0.96%**
NE	0.51%	1.54%	0.00%	**2.05%**	-1.0%	-2.4%	0.0%	**-3.41%**
NH	1.12%	3.11%	0.00%	**4.23%**	-1.3%	-1.2%	0.0%	**-2.52%**
NJ	1.10%	6.07%	0.00%	**7.18%**	-2.3%	-5.8%	0.0%	**-8.13%**
NM	0.92%	2.43%	0.00%	**3.35%**	-0.5%	-1.7%	0.0%	**-2.19%**
NV	1.23%	11.10%	0.00%	**12.33%**	-0.7%	-3.6%	0.0%	**-4.30%**
NY	1.09%	3.95%	0.00%	**5.04%**	-3.0%	-3.4%	0.0%	**-6.42%**
OH	0.57%	2.46%	0.00%	**3.03%**	-0.9%	-2.1%	0.0%	**-3.03%**
OK	0.11%	0.58%	0.00%	**0.69%**	-0.3%	-0.3%	0.0%	**-0.63%**
OR	1.96%	8.99%	0.00%	**10.95%**	-2.1%	-2.4%	0.0%	**-4.45%**
PA	0.87%	2.89%	0.00%	**3.77%**	-1.7%	-2.5%	0.0%	**-4.24%**
RI	0.95%	2.66%	0.00%	**3.60%**	-2.1%	-3.8%	0.0%	**-5.96%**
SC	0.59%	2.63%	0.00%	**3.22%**	-0.6%	-0.9%	0.0%	**-1.52%**
SD	1.09%	1.10%	0.00%	**2.20%**	-0.5%	-0.9%	0.0%	**-1.43%**
TN	0.51%	2.86%	0.00%	**3.37%**	-0.5%	-2.0%	0.0%	**-2.42%**
TX	0.61%	6.62%	0.00%	**7.23%**	-0.3%	0.8%	0.0%	**0.45%**
UT	0.88%	4.29%	0.00%	**5.17%**	-1.1%	-3.9%	0.0%	**-4.99%**
VA	1.05%	4.28%	0.00%	**5.34%**	-1.2%	-4.3%	0.0%	**-5.45%**
VT	1.74%	3.60%	0.00%	**5.34%**	-2.2%	-4.6%	0.0%	**-6.80%**
WA	1.92%	12.88%	0.00%	**14.80%**	-1.5%	-5.1%	0.0%	**-6.54%**
WI	0.60%	1.77%	0.00%	**2.36%**	-0.8%	-2.6%	0.0%	**-3.36%**
WV	0.41%	1.12%	0.00%	**1.52%**	-0.4%	-0.9%	0.0%	**-1.25%**
WY	0.54%	1.21%	0.00%	**1.74%**	-0.3%	-0.6%	0.0%	**-0.96%**
U.S.	**0.91%**	**5.61%**	**0.00%**	**6.52%**	**-1.2%**	**-3.1%**	**0.0%**	**-4.37%**

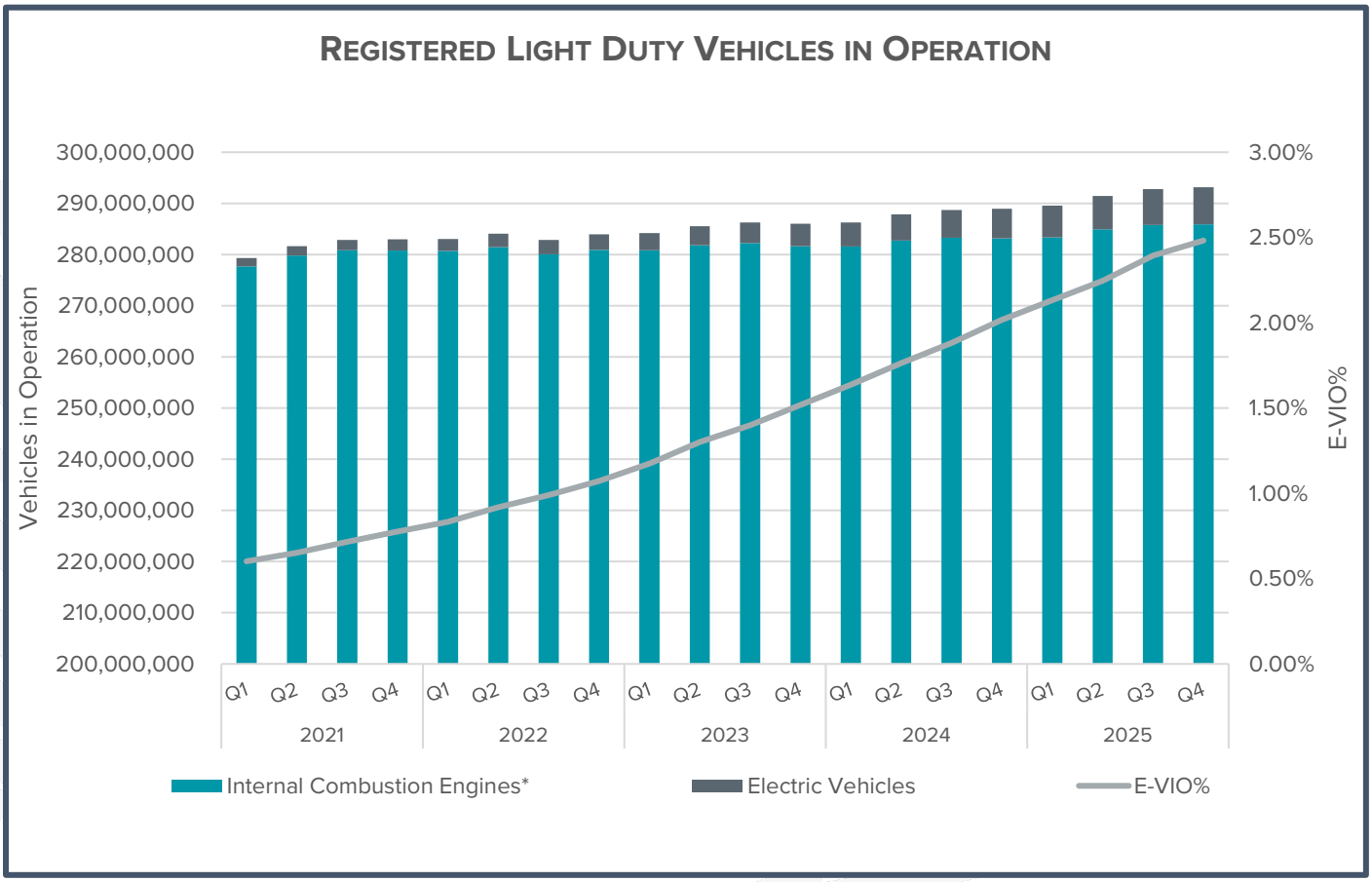
Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering October 1 – December 31, 2024, and October 1 – December 31, 2025

2025 (Full Year) New Light-Duty Vehicle Registrations By Powertrain					Change In Market Share (Full Year 2025 vs 2024), New Light-Duty Vehicle Registrations Powertrain			
State	Advanced Powertrain Market Share				Advanced Powertrain Market Share (Percentage Point Change)			
	PHEV	BEV	FCEV	EV Total	PHEV	BEV	FCEV	EV Total
AK	0.63%	2.50%	0.00%	**3.13%**	-0.08	-0.19	0.00	**-0.26**
AL	0.58%	3.04%	0.00%	**3.62%**	0.05	-0.41	0.00	**0.36**
AR	0.54%	2.03%	0.00%	**2.57%**	0.01	0.07	0.00	**-0.08**
AZ	1.18%	7.59%	0.00%	**8.77%**	0.20	0.41	0.00	**-0.61**
CA	3.42%	20.42%	0.02%	**23.86%**	0.16	2.11	0.01	**-2.29**
CO	4.23%	15.62%	0.00%	**19.85%**	1.58	1.16	0.00	**-2.74**
CT	2.88%	7.54%	0.00%	**10.42%**	1.08	-0.03	0.00	**-1.06**
DC	4.29%	14.70%	0.00%	**18.98%**	1.00	-0.08	0.00	**-0.92**
DE	2.02%	7.23%	0.00%	**9.26%**	0.30	0.96	0.00	**-1.26**
FL	1.35%	8.58%	0.00%	**9.93%**	-0.03	-0.59	0.00	**0.62**
GA	1.07%	7.63%	0.00%	**8.70%**	-0.09	-0.92	0.00	**1.00**
HI	1.52%	9.28%	0.00%	**10.80%**	2.33	0.53	0.00	**-2.86**
IA	0.95%	2.81%	0.00%	**3.76%**	0.11	-0.11	0.00	**0.01**
ID	1.20%	3.60%	0.00%	**4.81%**	0.20	0.07	0.00	**-0.27**
IL	1.58%	6.55%	0.00%	**8.14%**	-0.05	-0.34	0.00	**0.38**
IN	1.05%	4.24%	0.00%	**5.29%**	0.04	-0.24	0.00	**0.20**
KS	0.90%	3.65%	0.00%	**4.56%**	0.24	0.17	0.00	**-0.40**
KY	0.91%	2.89%	0.00%	**3.79%**	-0.10	0.16	0.00	**-0.06**
LA	0.44%	3.05%	0.00%	**3.49%**	0.06	-1.41	0.00	**1.35**
MA	2.61%	7.94%	0.00%	**10.56%**	1.22	0.51	0.00	**-1.73**
MD	1.98%	7.77%	0.00%	**9.75%**	0.75	1.56	0.00	**-2.31**
ME	1.62%	3.04%	0.00%	**4.66%**	1.47	0.79	0.00	**-2.26**
MI	2.08%	6.54%	0.00%	**8.61%**	-0.93	-1.43	0.00	**2.36**
MN	1.67%	4.91%	0.00%	**6.58%**	0.23	0.43	0.00	**-0.67**
MO	0.78%	3.02%	0.00%	**3.81%**	1.24	0.73	0.00	**-1.97**
MS	0.35%	1.88%	0.00%	**2.24%**	0.04	-0.39	0.00	**0.34**
MT	1.43%	2.33%	0.00%	**3.77%**	0.03	0.36	0.00	**-0.38**
NC	1.38%	6.25%	0.00%	**7.63%**	-0.12	-0.15	0.00	**0.27**
ND	0.42%	1.40%	0.00%	**1.82%**	0.11	-0.12	0.00	**0.01**
NE	0.99%	3.25%	0.00%	**4.24%**	0.34	-0.03	0.00	**-0.31**
NH	1.69%	3.87%	0.00%	**5.57%**	0.62	-0.29	0.00	**-0.33**
NJ	2.48%	9.74%	0.00%	**12.23%**	0.45	1.37	0.00	**-1.82**
NM	1.07%	3.93%	0.00%	**4.99%**	0.09	0.05	0.00	**-0.15**
NV	1.85%	14.35%	0.00%	**16.20%**	-0.04	-1.13	0.00	**1.18**
NY	2.72%	6.39%	0.00%	**9.11%**	1.28	-0.24	0.00	**-1.04**
OH	1.18%	4.06%	0.00%	**5.24%**	0.03	-0.04	0.00	**0.01**
OK	0.31%	0.92%	0.00%	**1.23%**	2.40	0.07	0.00	**-2.47**
OR	3.45%	12.06%	0.00%	**15.51%**	0.76	-0.22	0.00	**-0.54**
PA	1.78%	4.54%	0.00%	**6.32%**	0.62	0.07	0.00	**-0.68**
RI	1.96%	4.81%	0.00%	**6.77%**	1.33	0.40	0.00	**-1.73**
SC	0.94%	3.51%	0.00%	**4.45%**	0.13	-0.23	0.00	**0.10**
SD	1.57%	1.78%	0.00%	**3.35%**	-0.51	-0.13	0.00	**0.64**
TN	0.94%	4.31%	0.00%	**5.26%**	-0.24	0.04	0.00	**0.20**
TX	0.88%	6.22%	0.00%	**7.10%**	-0.02	-0.60	0.00	**0.62**
UT	1.75%	7.04%	0.00%	**8.78%**	-0.06	0.66	0.00	**-0.60**
VA	1.82%	6.55%	0.00%	**8.37%**	-0.07	1.04	0.00	**-0.97**
VT	2.88%	6.31%	0.00%	**9.19%**	1.21	1.78	0.00	**-2.99**
WA	2.94%	16.04%	0.00%	**18.98%**	0.28	1.74	0.00	**-2.02**
WI	1.04%	3.41%	0.00%	**4.45%**	0.02	0.33	0.00	**-0.35**
WV	0.56%	1.45%	0.00%	**2.01%**	0.17	0.12	0.00	**-0.29**
WY	0.69%	1.57%	0.00%	**2.26%**	0.24	0.27	0.00	**-0.52**
U.S.	**1.72%**	**7.87%**	**0.00%**	**9.59%**	**0.36**	**0.27**	**0.00**	**-0.62**

Source: Figures compiled by Alliance for Automotive Innovation with new registrations for retail and fleet data provided by S&P Global Mobility covering January 1 – December 31, 2024, and January 1 – December 31, 2025

Registrations and Charging/Refueling

Share of Registered EVs In U.S. Light-Duty Fleet Continues to Increase Incrementally. As sales of EVs continue, so do the total number of EVs operating on U.S. roads. There are now 7.3 million EVs in operation in the United States, representing 2.5 percent of all light vehicles in operation (an increase of 0.09 pp from Q3 2025). EVs represented more than 1 percent of total vehicles in operation (VIO) for the first time at the end of 2022 and topped 2 percent for the first time at the end of 2024. The electric vehicles in operation (E-VIO) of 2.5 percent is an increase of 0.5 pp since the fourth quarter of 2024 and more than four times the E-VIO from the first quarter in 2021 (0.60 percent).[4] Since the beginning of 2023, the average increase quarter-over-quarter is 0.12 pp. The continued growth in E-VIO has implications for the number of chargers needed to support their operation.



U.S. Public Charging Infrastructure: Overview

Here is a snapshot of publicly available EV charging and refueling infrastructure[5] available across the United States at the end of 2025[6]:

Station and Charging Ports Through 2025

Level 2: 65,463 Stations, 169,967 EVSE Ports

[4] Registered vehicles in operation compiled by Alliance for Automotive Innovation with data provided by S&P Global Mobility as December 31, 2025
[5] "Stations" denotes stations as counted and identified by U.S. Department of Energy Alternative Fuels Data Center. Stations differs from number of locations as many stations can be at a singular location. Locations denote unique addresses.
[6] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of December 31, 2025
Note: prior editions of this report excluded proprietary chargers, however Tesla opened their previously proprietary chargers in November 2022 and their "North American Charging Standard" will be widely adopted by automakers.

DC Fast: 14,320 Stations, 66,926 EVSE Ports
Hydrogen Refueling: 52 Stations (50 are in California)
U.S. Total: *78,376[7] EVSE Stations, 236,945 EVSE Ports*

See Recommended Attributes for EV Charging Stations

Charging Infrastructure by Unique[8] Location

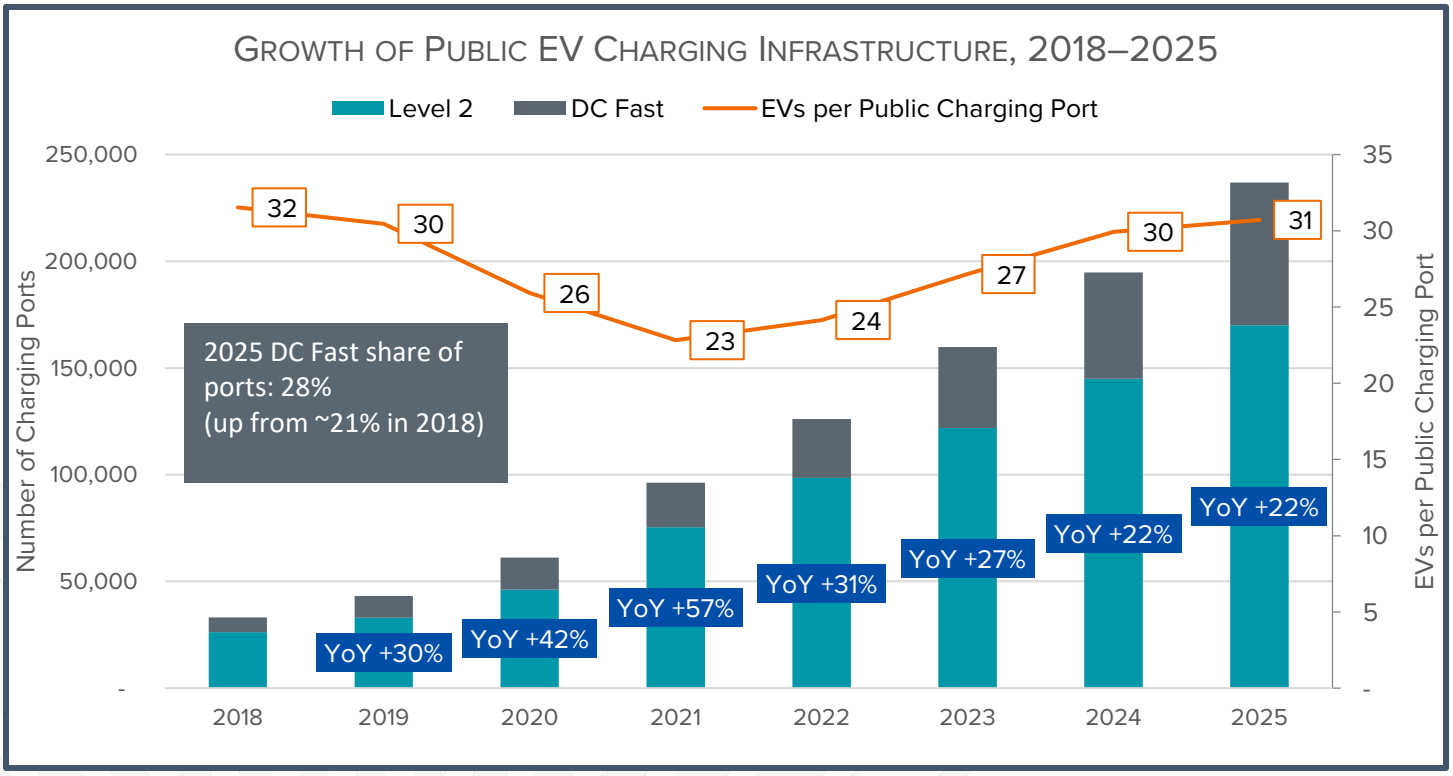
State	Locations	L2 Ports	DC Fast Ports	State	Locations	L2 Ports	DC Fast Ports
AK	68	107	89	MT	134	215	247
AL	405	806	846	NC	1,518	4,042	1,771
AR	317	841	246	ND	90	131	145
AZ	1,034	3,256	1,360	NE	258	470	226
CA	10,128	45,513	16,793	NH	228	469	325
CO	1,782	4,915	1,457	NJ	1,275	3,531	1,923
CT	1,195	3,735	750	NM	329	586	541
DC	254	1,019	58	NV	445	1,524	1,083
DE	183	486	293	NY	3,792	15,528	2,815
FL	3,182	9,386	4,243	OH	1,471	3,698	1,369
GA	1,626	5,228	1,996	OK	355	652	1,016
HI	293	786	177	OR	1,211	2,907	1,182
IA	396	700	530	PA	1,510	3,903	1,740
ID	200	378	257	RI	220	719	127
IL	1,358	3,126	2,154	SC	562	1,190	860
IN	564	1,134	879	SD	108	163	151
KS	345	951	341	TN	777	2,074	964
KY	331	681	408	TX	2,939	7,596	4,563
LA	251	474	364	UT	640	2,114	723
MA	2,279	8,559	1,706	VA	1,262	3,783	1,625
MD	1,427	4,128	1,362	VT	409	1,049	271
ME	475	1,178	366	WA	1,780	5,823	1,969
MI	1,479	3,724	1,518	WI	669	1,347	784
MN	857	2,039	843	WV	167	341	214
MO	782	2,447	771	WY	110	165	167
MS	192	350	318	**US. Total**	**53,662**	**169,967**	**66,926**

U.S. Public Charging: Recent Progress

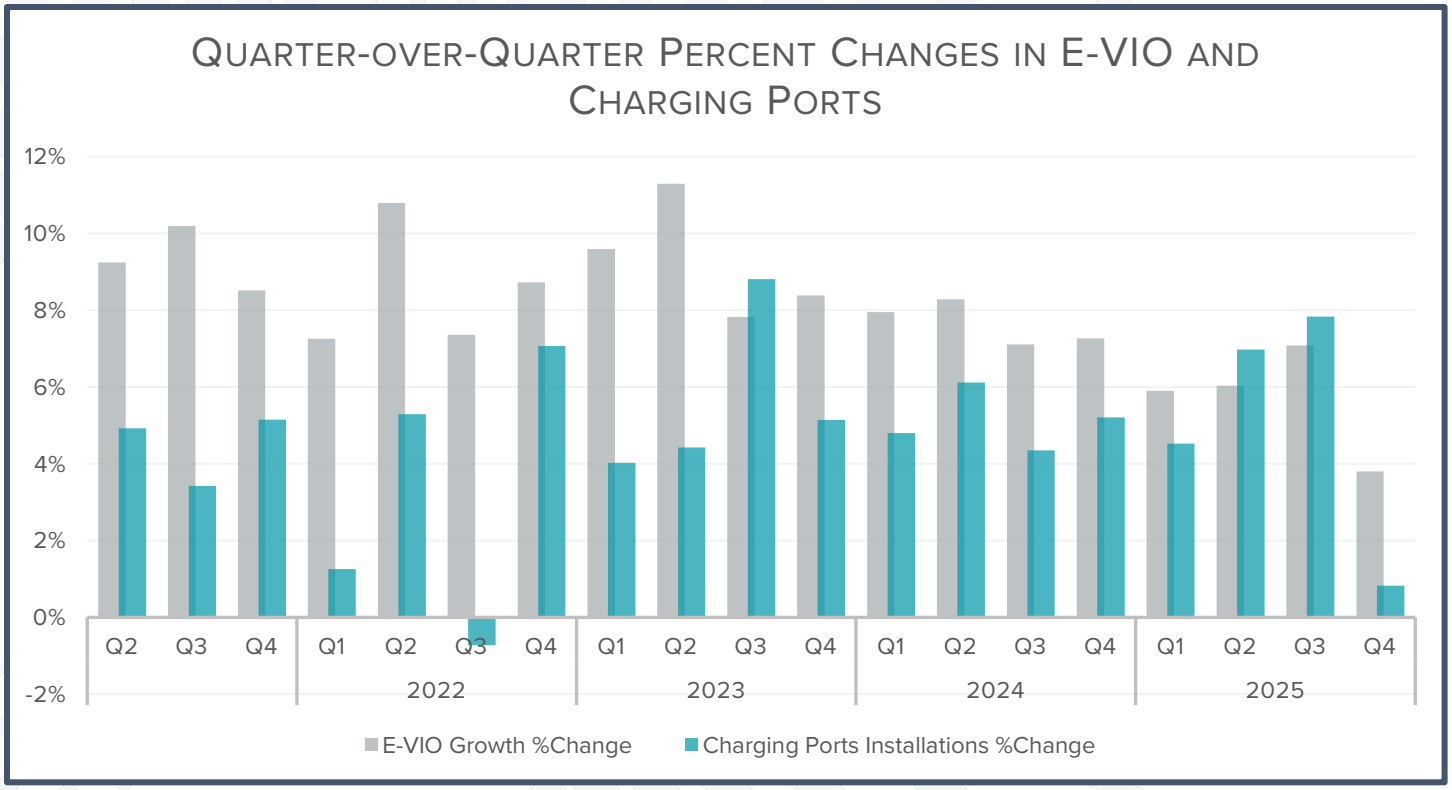
Through 2025, the number of public Level 2 charging ports increased by 17 percent compared to 2024, while DC fast chargers grew by 35 percent. In total, public charging ports expanded 22 percent from the end of 2024 to the end of 2025[9]. For context, the electric vehicles in operation (E-VIO) grew 25 percent over the same period.

[7] Some station locations have both Level 2 and DC Fast installed.
[8] Locations denote unique addresses.
[9] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of December 31, 2025

From 2018 to 2021, charging infrastructure expanded faster than the EV fleet, reducing the number of EVs per public charging port from 32 to 23. As EV adoption accelerated in recent years, the ratio increased again, reaching 31 EVs per port in 2025.



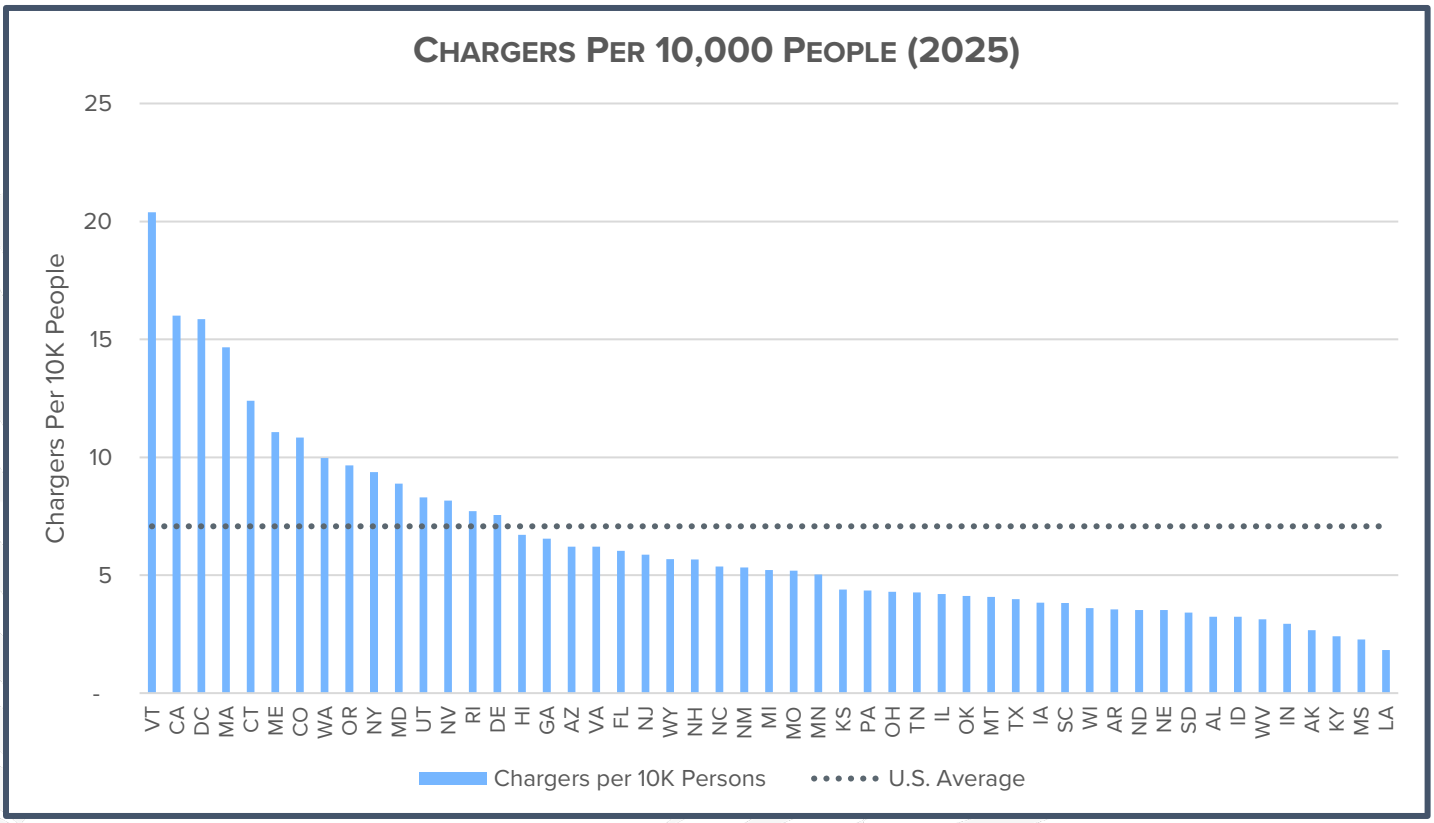
After two quarters in 2024 when charging deployment temporarily outpaced growth in the EV fleet, the longer-term pattern has reasserted itself, with E-VIO once again growing faster than charging infrastructure.



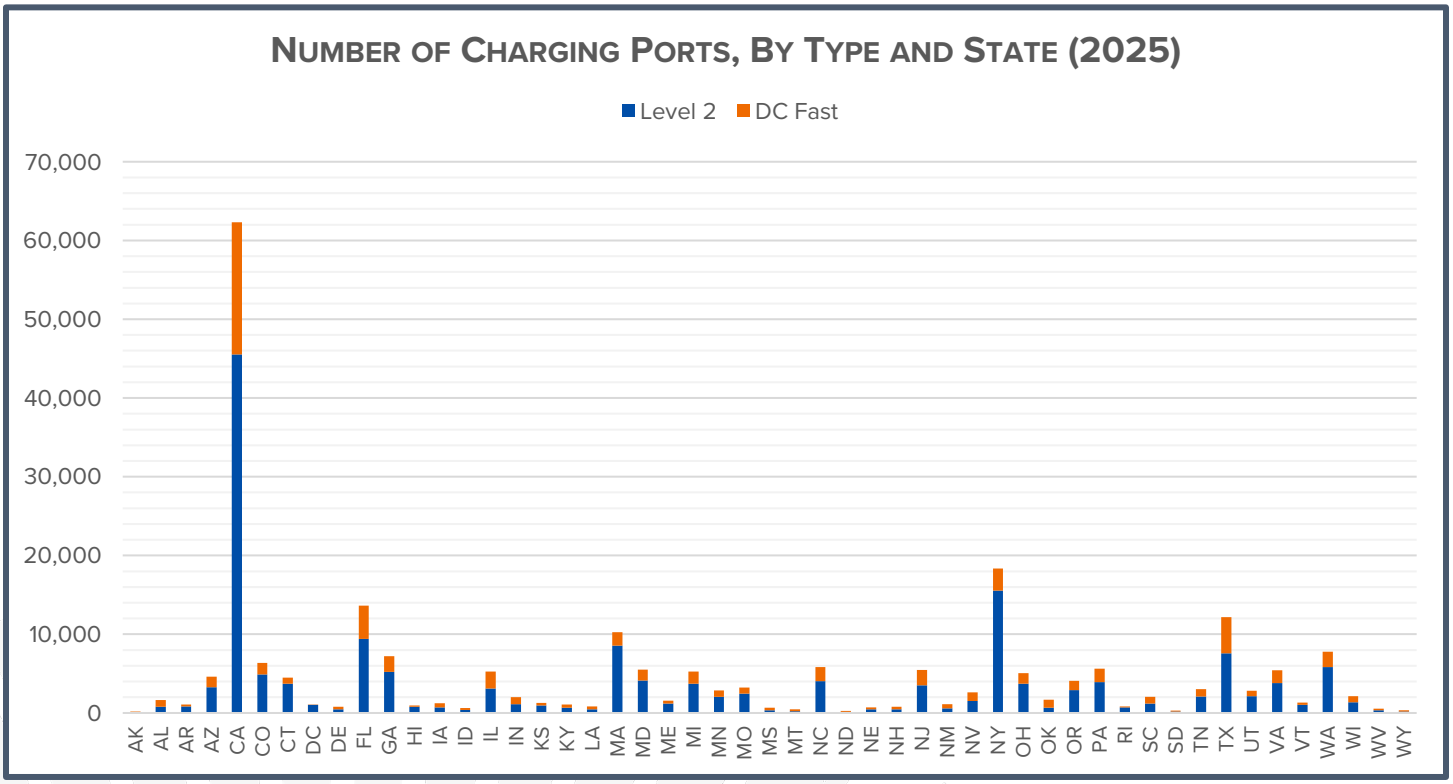
Although charging infrastructure expanded significantly in 2025, EV fleet growth once again moved slightly faster, highlighting the ongoing need to scale public charging alongside vehicle adoption.

U.S. Public Charging: Chargers Per Capita

While it's useful to understand how many charging ports are installed, it's also important to understand the number of chargers in comparison to each state's population. While some states may seem better positioned due to a higher number of chargers, those states shift when compared at a per capita basis. California has by far the most installed public charging equipment, but due to the state's size, their per capita rate is 16 chargers per 10,000 people. The national average is 7 chargers per 10,000 people.[10]

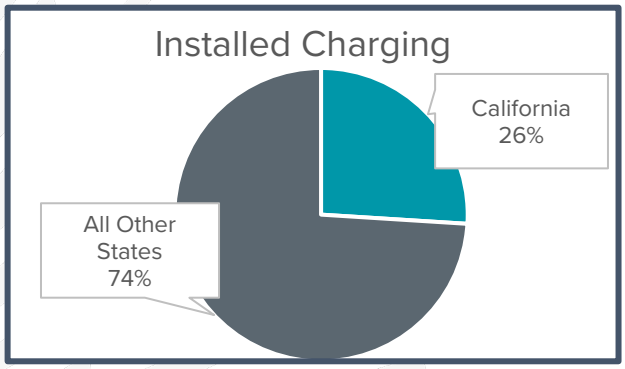


[10] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of December 31, 2025



[11]

Infrastructure Distribution and Disparities by Geography



Geographic disparities in charging infrastructure are pervasive. At the end of 2025, just over a quarter of all public charging infrastructure was in California, which had 31 percent of all registered EVs.

U.S. Public Charging Outlook: Scale, Reliability, Cost, and Adoption Implications

As noted above, the U.S. fast-charging network is expanding, but growth remains uneven relative to electric vehicle adoption and access to public charging remains a key barrier to EV adoption. A J.D. Power study found 41 percent of shoppers who are unlikely to consider an EV were concerned about access to public charging.[12]

Paren's U.S. EV Fast Charging report forecasts that 2025 will see approximately 16,700 new DC fast-charging points installed nationwide, a 19 percent year-over-year increase and three times the number added in 2021. At this pace, Paren projects that the total number of U.S. fast-charging ports will surpass 100,000 by 2027, nearly double the size of the network in 2024 and approximately four times the number installed in 2022.[13]

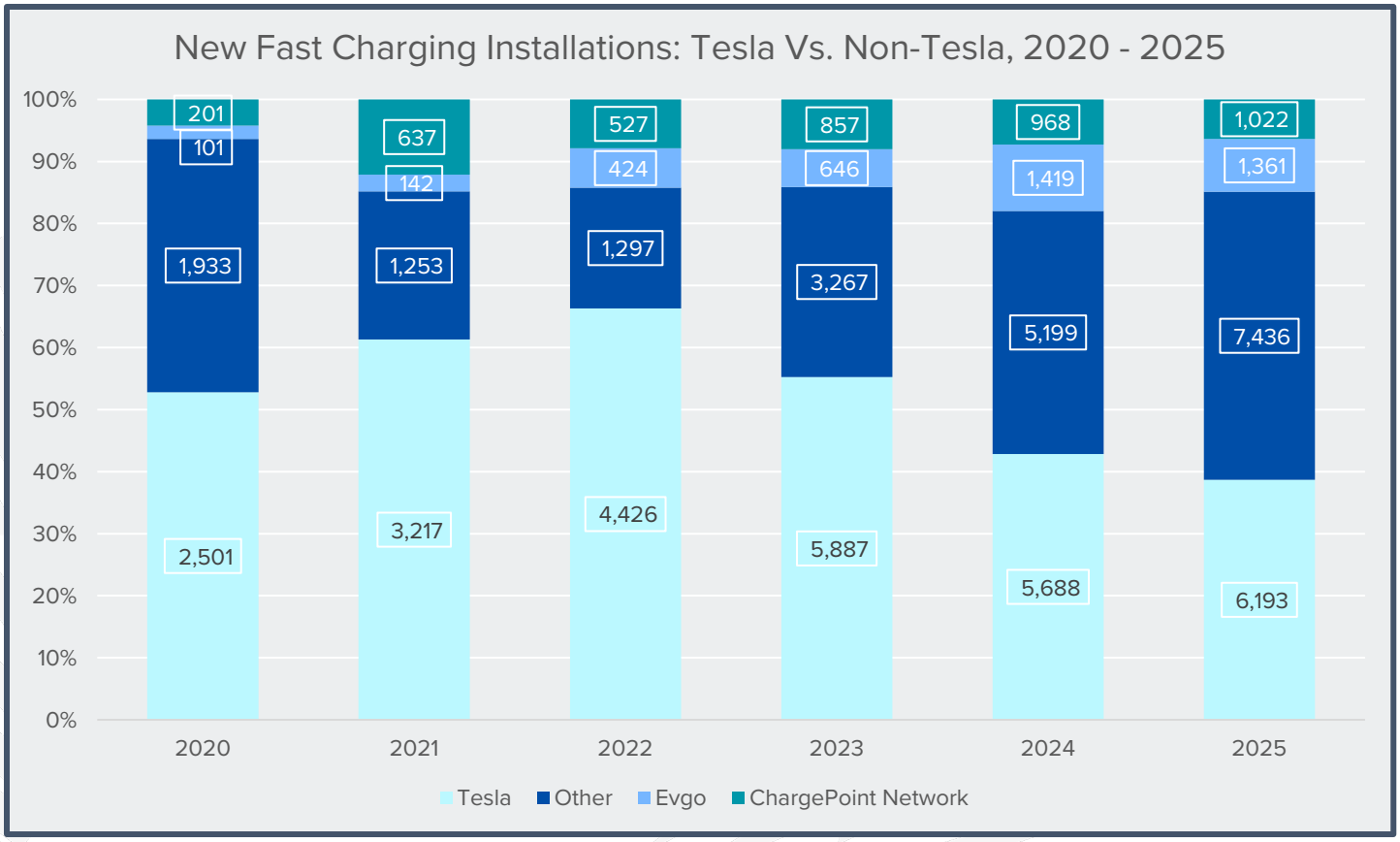
Despite this growth, multiple studies suggest that current and planned infrastructure still lags recommended public charger-to-EV ratios. Industry and research benchmarks frequently cite an optimal ratio of roughly 8 to 12 EVs per public charger to ensure reasonable access and minimize wait times[14]. By contrast, our analysis shows the U.S. average is 31, with states varying from 9 EVs per charger (Wyoming) up to 48 EVs per charger (New Jersey). Nearly

[11] Charging information from U.S. Department of Energy Alternative Fuels Data Center, stations in operation as of December 31, 2025
[12] E-Vision Intelligence Report, "Despite Improvements in Reliability and Availability, Public Charging Remains Top Stumbling Block to EV Adoption," J.D. Power, 6/2025
[13] Kit Million Ross, "US fast EV charging deploying at 'record pace'," EV Infrastructure News, 7/29/2025
[14] Susan Carpenter, "Study: Most States Lag In EV Charger Infrastructure," *Spectrum New*, 9/9/2024

half of the states have 25 EVs or more per charge. This gap indicates that continued investment and accelerated build-out remain critical to supporting mainstream EV adoption, even as installation rates increase.

The composition of new infrastructure is also shifting in ways that may improve network performance. Non-Tesla fast charging networks are now leading new deployment, with 2024 marking the first year in which new non-Tesla fast chargers outnumbered new Tesla installations. A more diversified charging ecosystem reduces reliance on a single provider and increases redundancy, which is particularly important in regions where charger scarcity amplifies the consequences of equipment failure.

Tesla Dropped From 55 Percent of All New Fast Charging Installations In 2023 To 39 Percent In 2025:



Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of December 31, 2025

Level 2 Chargers and DC Fast Chargers

Both Level 2 and DC Fast charging play important roles in electrifying the light-duty vehicle fleet. However, the key difference between Level 2 and DC Fast chargers is how quickly each will charge an EV's battery. Level 2 equipment is common for home, workplace, and public charging with longer dwell times. Level 2 chargers can fully charge a BEV from empty in 4-10 hours and a PHEV from empty in 1-2 hours. DC Fast charging equipment enables rapid charging of BEVs in 20 minutes to 1 hour along heavy-traffic corridors, in city centers, at transportation hubs, and fleet depots. Wider installation of Level 2 chargers, DC Fast chargers, and hydrogen fueling will be necessary to support current and future EV sales.

Recent reliability research underscores the importance of this new build-out. Studies measuring first-time charge success rates, rather than self-reported "uptime," consistently find that newer charging stations perform significantly better than older installations. Real-world data show first-attempt success rates in the mid-80 percent range for newer chargers, compared with low-70 percent or worse for stations older than three years, as hardware degradation, software compatibility issues, and deferred maintenance accumulate.[15] As a result, the current wave of investment is likely to raise average network reliability.

Cost remains a parallel concern. Multiple analyses find that charging away from home – particularly via DC fast chargers – costs two to three times more per kilowatt-hour than residential charging, with average home rates around $0.17–$0.18/kWh[16] compared with $0.40–$0.50/kWh[17] or higher for public fast charging in many regions. These higher costs are driven by capital expenses, utility demand charges, and limited competition at many charging sites.

However, greater charger density and increased competition among networks benefit consumers. As more fast chargers are deployed (especially in high-traffic corridors and urban areas where multiple providers co-locate) drivers gain alternatives, and networks face stronger pressure to compete on price, reliability, and user experience. While public charging is likely to remain more expensive than home charging, expanded access and competition could slow price escalation and reduce extreme regional price disparities, improving the overall economics of EV ownership for drivers without reliable home charging access.

Taken together, the data suggest that charging infrastructure investment remains a central lever for EV adoption. While rapid growth in fast-charging deployment is improving reliability and expanding consumer choice, the gap between recommended charger-to-EV ratios and current infrastructure levels persists. Closing that gap by accelerating deployment of newer, more reliable chargers and fostering competition across networks will be essential to reducing cost barriers, improving user confidence, and enabling the next phase of EV adoption in the United States.

Alliance for Automotive Innovation is proactively engaging to address EV policy needs through development of a lithium-ion battery recycling policy framework, recommendations for attributes of EV charging stations.

[15] Charger Help, "ChargerHelp Report Reveals Charge Success Rate and not Uptime More Accurate Metric for EV Driver Experience," 9/24/2025
[16] Casey McDevitt, "How EV home charging vs. public charging affects your wallet," EnergySage, 10/20/2025
[17] Jonathan Touriño Jacobo, "US Fast-Charging EV Charging Price Increases To US$0.49/Kwh In Q3 2025," EV Infrastructure News,

Vehicles in Operation and Charging Infrastructure by State

Public Charging Outlets And Registerd EVs (as of 12/31/2025)								
	EV Level 2	EV DC Fast	H2* Fueling	Total	Percent EVs of Total VIO**	Share of Registered EVs U.S.***	EVs Per Charger	EVs Per 10K Residents
AK	107	89		196	0.86%	0.07%	27	73.07
AL	806	846		1,652	0.59%	0.42%	19	60.45
AR	841	246		1,087	0.56%	0.22%	15	52.48
AZ	3256	1360		4,616	2.50%	2.40%	38	234.66
CA	45513	16793	50	62,356	7.20%	31.18%	36	582.22
CO	4915	1457		6,372	3.87%	2.98%	34	369.24
CT	3735	750		4,485	2.42%	1.03%	17	208.09
DC	1019	58		1,077	5.08%	0.24%	16	252.35
DE	486	293		779	2.38%	0.30%	28	214.95
FL	9386	4243		13,629	2.66%	7.29%	39	234.72
GA	5228	1996		7,224	1.88%	2.52%	25	166.29
HI	786	177	1	964	3.86%	0.60%	46	306.42
IA	700	530		1,230	0.71%	0.32%	19	73.17
ID	378	257		635	1.06%	0.31%	35	113.04
IL	3126	2154		5,280	2.04%	2.91%	40	168.63
IN	1134	879		2,013	1.00%	0.88%	32	92.90
KS	951	341		1,292	0.89%	0.37%	21	90.36
KY	681	408		1,089	0.69%	0.39%	26	63.11
LA	474	364		838	0.61%	0.32%	28	50.74
MA	8559	1706		10,265	3.06%	2.37%	17	245.97
MD	4128	1362		5,490	3.01%	2.18%	29	257.01
ME	1178	366		1,544	1.64%	0.31%	15	160.87
MI	3724	1518		5,242	1.58%	1.89%	26	136.72
MN	2039	843		2,882	1.55%	1.14%	29	144.11
MO	2447	771		3,218	1.00%	0.80%	18	94.02
MS	350	318		668	0.32%	0.14%	15	34.16
MT	215	247		462	0.59%	0.16%	25	100.78
NC	4042	1771		5,813	1.58%	2.15%	27	144.17
ND	131	145		276	0.34%	0.04%	10	36.52
NE	470	226		696	0.80%	0.24%	25	86.99
NH	469	325		794	1.73%	0.32%	30	167.24
NJ	3531	1923		5,454	3.40%	3.58%	48	280.78
NM	586	541		1,127	1.14%	0.33%	21	112.26
NV	1524	1083		2,607	3.90%	1.38%	39	314.39
NY	15528	2815		18,343	2.85%	4.45%	18	165.51
OH	3698	1369		5,067	1.18%	1.77%	25	109.40
OK	652	1016		1,668	1.34%	0.86%	37	153.68
OR	2907	1182		4,089	3.46%	1.87%	33	321.01
PA	3903	1740		5,643	1.55%	2.37%	31	132.84
RI	719	127		846	1.94%	0.18%	15	116.68
SC	1190	860		2,050	0.86%	0.66%	23	88.96
SD	163	151		314	0.54%	0.07%	17	58.01
TN	2074	964		3,038	1.03%	1.00%	24	101.95
TX	7596	4563	1	12,160	1.82%	6.40%	38	152.70
UT	2114	723		2,837	2.69%	1.18%	30	250.55
VA	3783	1625		5,408	2.07%	2.24%	30	186.91
VT	1049	271		1,320	3.49%	0.27%	15	300.29
WA	5823	1969		7,792	4.12%	3.99%	37	371.52
WI	1347	784		2,131	1.06%	0.80%	27	98.56
WV	341	214		555	0.47%	0.10%	14	42.39
WY	165	167		332	0.46%	0.04%	9	53.32
U.S.	**169,967**	**66,926**	**52**	**236,945**	**2.48%**	**100.00%**	**31**	**217.28**

*Hydrogen count denotes stations
** VIO is vehicles in operation;
*** State share of U.S. Total
Source: Figures compiled by Alliance for Automotive Innovation with registered vehicle data provided by S&P Global Mobility as of December 31, 2025; Charging information from U.S. Department of Energy Alternative Fuels Data Center, as of December 31, 2025

REGISTRATIONS

EV registrations as a share of all registered light-duty vehicles are 2.48 percent (as of December 31, 2025). There are more than 293 million registered light-duty vehicles in the U.S.

At the end of 2025, California accounted for 31.2 percent of all registered light-duty EVs in the U.S.

States with highest portion of total EVs registered:

1. CA (2,268,646, 7.2%)
2. DC (17,134, 5.08%)
3. WA (290,263, 4.12%)
4. NV (100,423, 3.9%)
5. CO (217,022, 3.87%)
6. HI (43,975, 3.86%)
7. VT (19,443, 3.49%)
8. OR (135,897, 3.46%)
9. NJ (260,872, 3.4%)
10. MA (172,214, 3.06%)

States with highest ratio of registered EVs per public charger:

1. NJ
2. HI
3. IL
4. FL
5. NV
6. TX
7. AZ
8. OK
9. WA
10. CA

Read more about automakers plans for ***ELECTRIC VEHICLES HERE***

Spotlight: Geographic Distribution Of EVs & Infrastructure

Geographic Distribution of Electric Vehicle Registrations

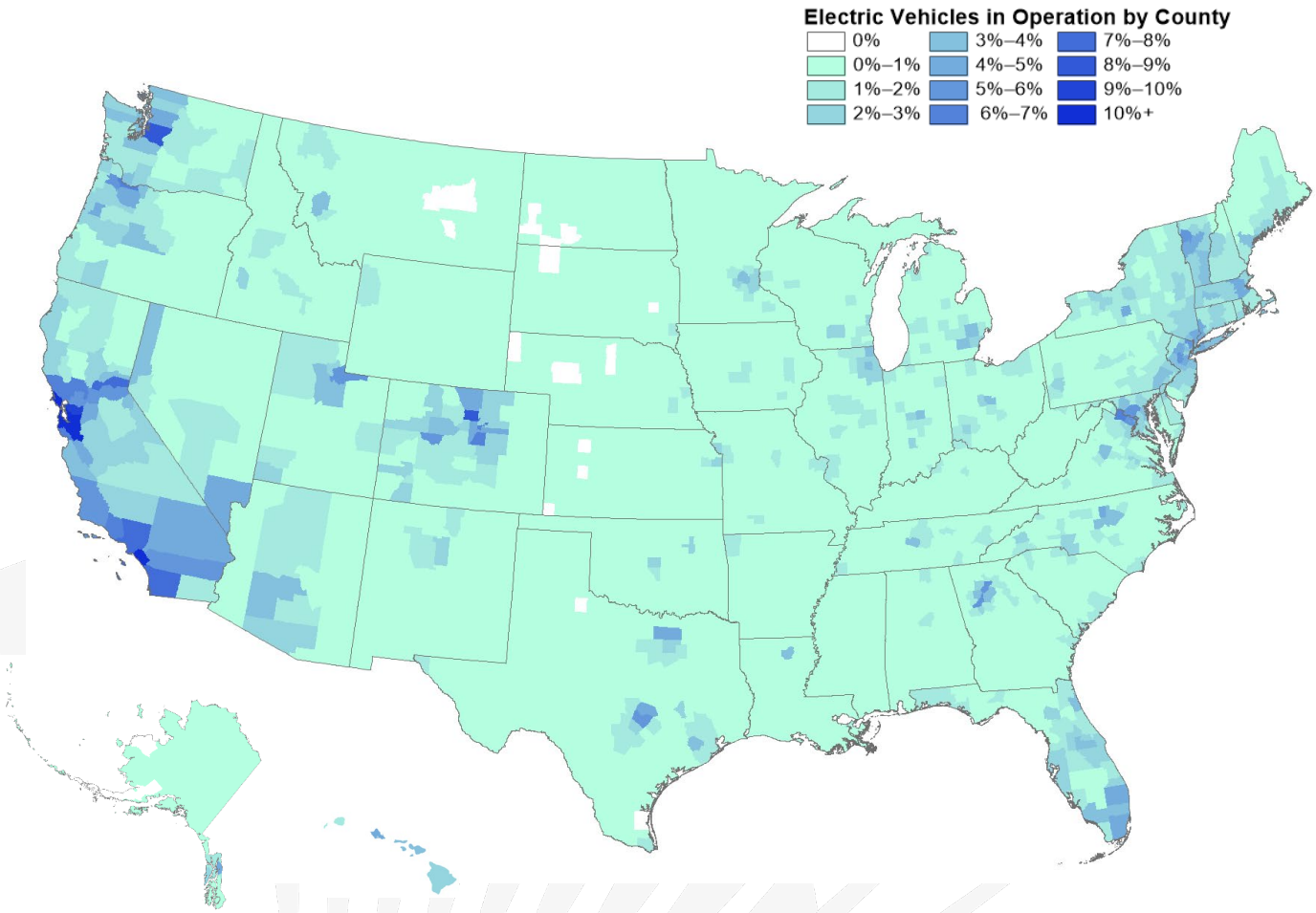
EV Adoption Is Highly Concentrated in a Small Number of Counties. There are 3,144 counties and independent districts in the United States with more than 293 million vehicles in operation (VIO), including 7.3 million electric vehicles, representing 2.5 percent of the total U.S. vehicle fleet. While more populous states and counties naturally have more vehicles overall, EV adoption is not evenly distributed geographically.

For example, California is home to nearly 11 percent of all vehicles in operation nationwide but accounts for 31 percent of all EV registrations. By contrast, Texas—home to the second-largest number of registered vehicles—accounts for nearly 9 percent of total U.S. VIO but only 6.4 percent of EVs.

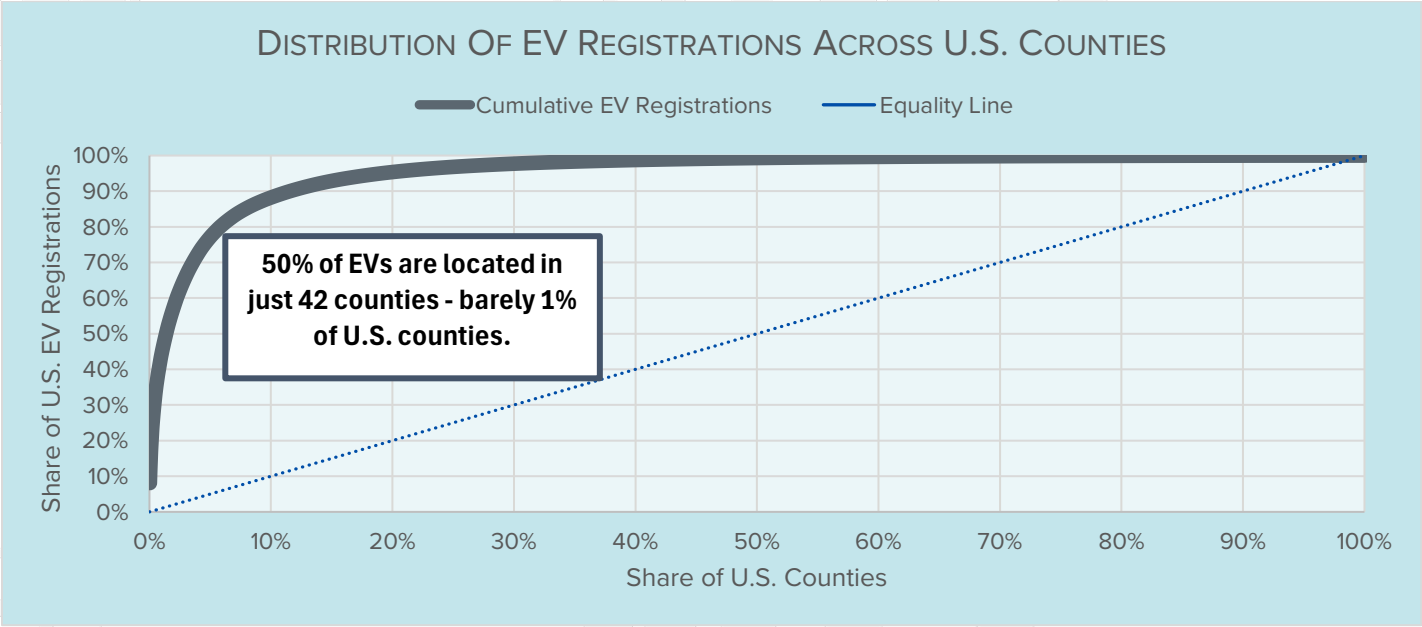
EV adoption is also highly concentrated at the county level. Half of all registered EVs in the United States are located in just 42 counties—about 1.4 percent of all counties nationwide. At the other end of the spectrum, 25 counties still have zero registered EVs, down from 39 counties in 2024.

EV Adoption Is Slowly Expanding Beyond Early Markets. While EV adoption remains concentrated in major metropolitan areas, it is expanding geographically. 646 counties (21 percent of all counties) now have EVs representing more than 1 percent of vehicles in operation, up from 493 counties in 2024. A total of 274 counties now have EV shares exceeding 2 percent of VIO, compared with 188 counties in 2024.

Electric Vehicle Registrations as a Percent of Total Vehicles in Operation
(By County, 2025)



The geographic concentration of EV registrations is illustrated in the chart below. The diagonal line represents a scenario in which EV registrations would be evenly distributed across all counties.

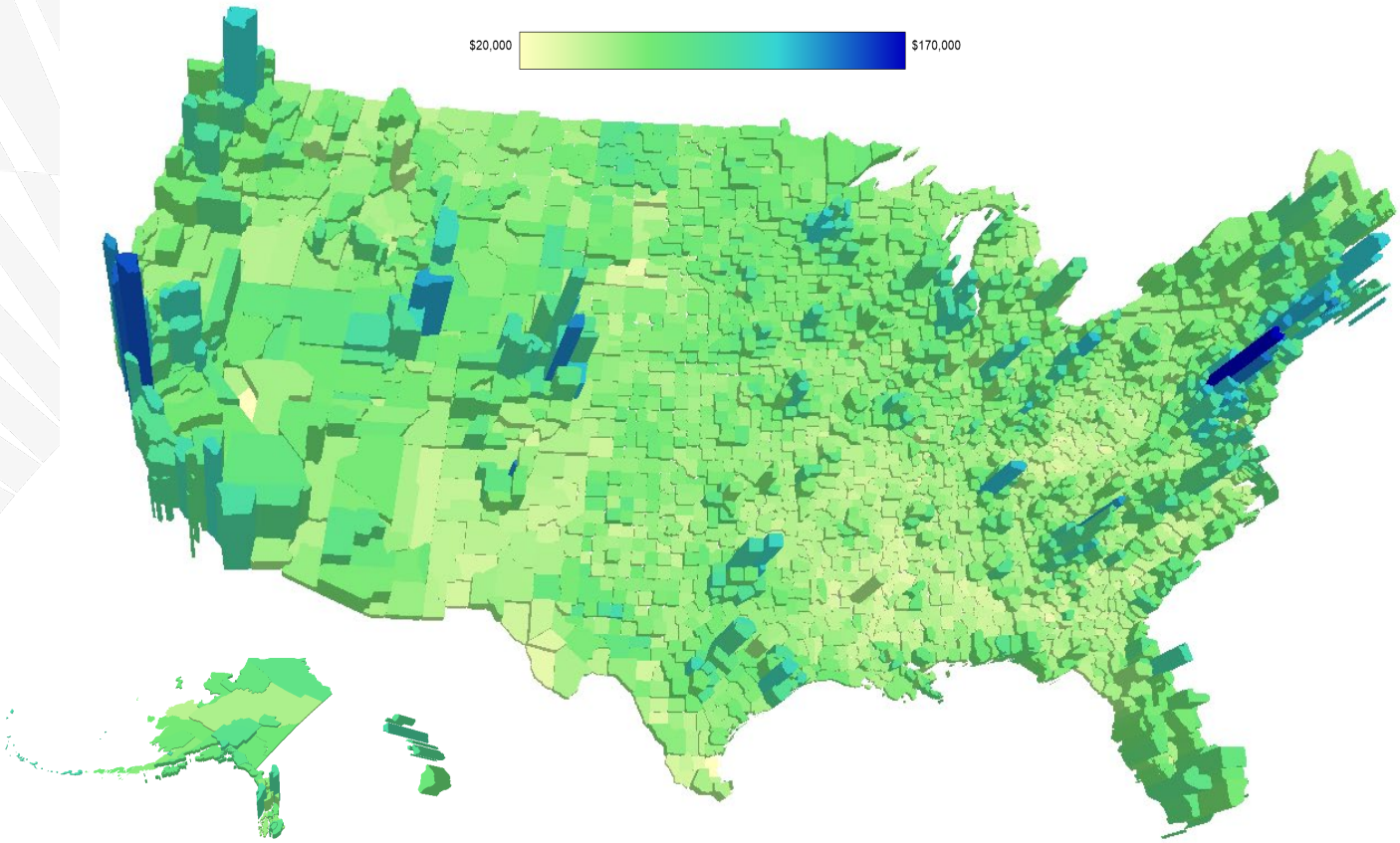


Highest EV Share of Vehicles in Operation (E-VIO)							
RANK	STATE	COUNTY	EV%VIO	RANK	STATE	COUNTY	EV%VIO
1	CALIFORNIA	SANTA CLARA	14.4%	6	CALIFORNIA	ORANGE	10.3%
2	CALIFORNIA	MARIN	13.5%	7	CALIFORNIA	CONTRA COSTA	9.3%
3	CALIFORNIA	SAN FRANCISCO	12.8%	8	COLORADO	BOULDER	8.8%
4	CALIFORNIA	SAN MATEO	12.8%	9	WASHINGTON	KING	8.2%
5	CALIFORNIA	ALAMEDA	12.4%	10	CALIFORNIA	LOS ANGELES	8.0%

EV Registrations Are Concentrated in Wealthier Counties. Among the counties with the highest EV registration rates (the top 10 percent, or 314 counties), nearly six in ten (59 percent) also rank in the top 10 percent nationally for median household income. The average median household income in these high-EV counties is $94,773. By comparison, counties with the lowest share of EVs in their vehicle fleet have an average median household income of $55,502.

Electric Vehicle Registrations As A Percent Of Total VIO And Median Household Income

(Height represents percent of EV VIO and color represents median household Income)



The geographic concentration of EV ownership also shapes where charging infrastructure is deployed across the country.

Geographic Distribution of Charging Infrastructure

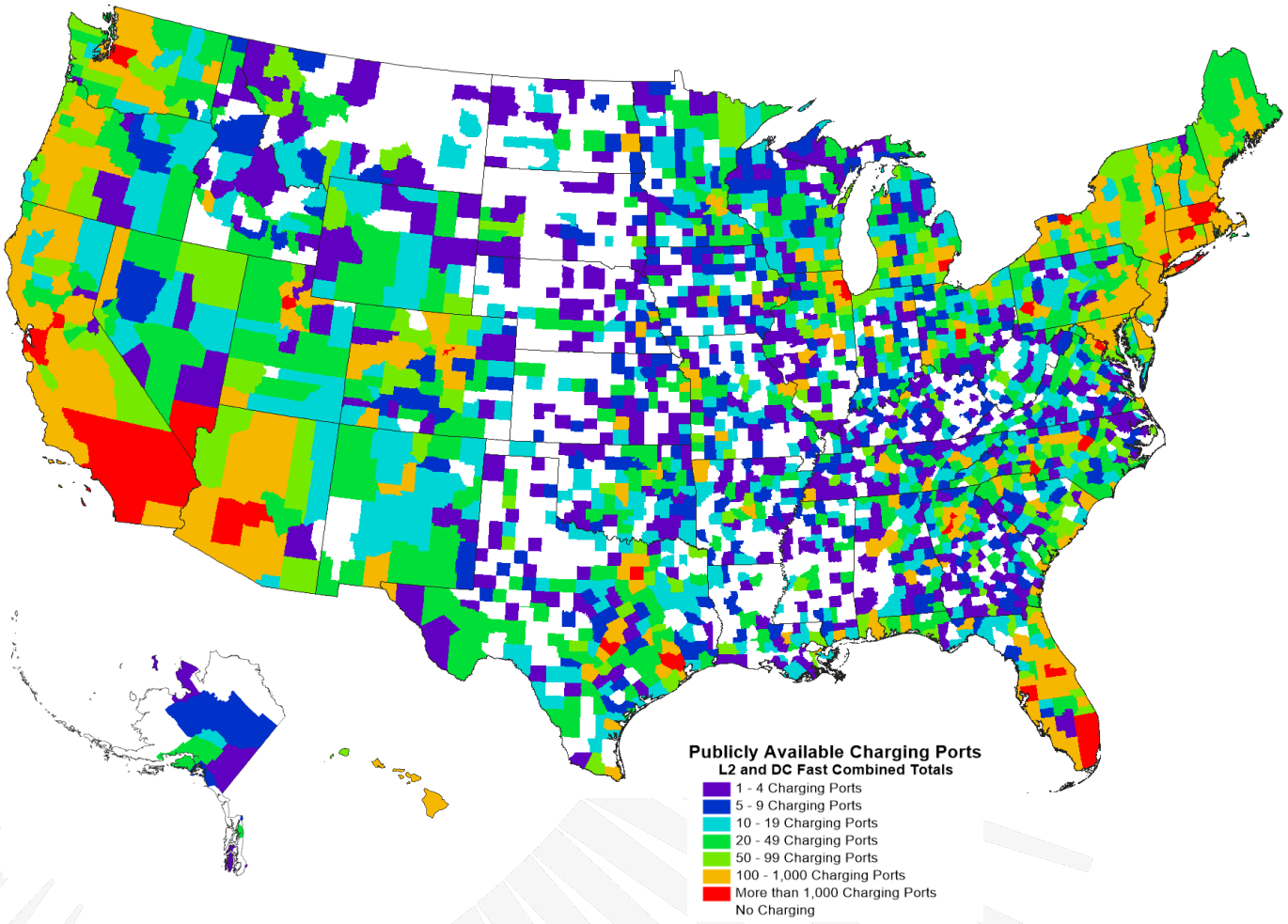
At the end of 2025, the United States had approximately 236,945 public charging ports supporting 7.3 million EVs on the road, a national average of 31 EVs per public charging port.

While charging infrastructure continues to expand, access remains uneven across the country. Twenty-six percent of U.S. counties (759 counties) had no public charging ports installed at the end of 2025, down slightly from 27 percent in 2024.

Even among counties with charging available, infrastructure is often limited. Counties with five or fewer charging ports account for 43 percent of all U.S. counties, underscoring the early stage of deployment in many parts of the country.

Charging infrastructure is also highly concentrated geographically. The top 25 counties account for more than one-third of all public charging ports nationwide—79,428 ports, or 34 percent of the U.S. total. Half of all public charging ports are located in just 64 counties, roughly 2 percent of all U.S. counties.

Fast charging infrastructure shows similar disparities. At the end of 2025, 41 percent of counties had no DC fast charging available, while 5 percent of counties had access to only a single fast-charging port. California alone is home to roughly 25 percent of all DC fast charging ports in the United States.

Available U.S. Public Charging At The End Of 2025

Two-Thirds of U.S. Counties Have Fewer Than 20 Public Charging Ports.